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## **Leading from the Margins: The Educational Leadership Experiences of Jesuit Directors of Mission High Schools in the Philippines and the Implications for the Leadership Formation of Filipino Jesuits**

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LOYOLA MARYMOUNT UNIVERSITY

Leading from the Margins: The Educational Leadership Experiences of Jesuit Directors of  
Mission High Schools in the Philippines and the Implications for the Leadership Formation of  
Filipino Jesuits

by

Guillrey Anthony M. Andal, S.J.

A dissertation presented to the Faculty of the School of Education,

Loyola Marymount University,

in partial satisfaction of the requirements for the degree

Doctor of Education

2020

Leading from the Margins: The Educational Leadership Experiences of Jesuit Directors of  
Mission High Schools in the Philippines and the Implications for the Leadership Formation of  
Filipino Jesuits

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by

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This dissertation written by Guillrey Anthony M. Andal, S.J., under the direction of the dissertation committee members, in partial fulfillment of the requirements for the degree of Doctor of Education.

February 27, 2020

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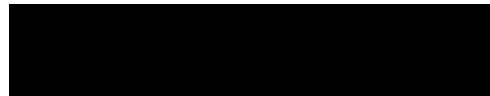
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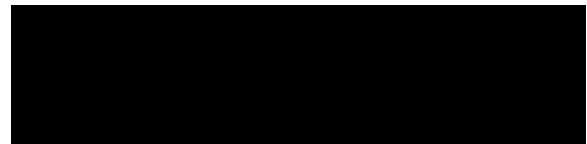
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Edmundo Litton, Ed.D.

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To my mother, father, and brother, I joyfully dedicate this dissertation.

And may God always be glorified and praised with my humble ministry in the margins.

*Ad Majorem Dei Gloriam.*

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## **ABSTRACT**

Leading from the Margins: The Educational Leadership Experiences of Jesuit Directors of Mission High Schools in the Philippines and the Implications for the Leadership Formation of Filipino Jesuits

by

Guillrey Anthony M. Andal, S.J.

Educational leadership preparation is not an explicit priority in the scholastic formation of future Catholic priests in the Philippines. Consequently, there may be those assigned to lead in parochial mission schools early on in their ordained ministry but lack leadership training and experience. Thus, this study sought to answer the following research questions:

- What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?
- What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders?

This phenomenological research explored the experiences of seven first-time Jesuit school directors of mission high schools in the Southern Philippines and examined their perceptions about the leadership formation that they received as seminarians before being

missioned to the ministry of leading high-needs schools in the peripheries of rural Philippines. Through a modified educational leadership preparation framework presented originally by Capper, Theoharis, and Sebastian (2006), I analyzed the qualitative data from the field and determined how the participants' peculiar leadership experiences and keen assessment of their seminary formation can inform enhancements in the Jesuit leadership formation's context-specific curriculum, andragogy, and holistic evaluation to prepare future Jesuit educational leaders' critical consciousness and socially just leadership knowledge and skills. In line with this, I recommended the institutionalization of programmatic leadership training modules for Jesuits before they are missioned as first-time school directors.

*Keywords:* Educational leadership preparation, Jesuits, Philippines, Seminary formation, Mission high schools, Priest school directors, Catholic clergy

## **PROLOGUE**

### **Beginning with My Story**

If I am to examine, understand, and describe the leadership experiences and formation of my Jesuit confreres, I must first acknowledge where my passion for socially just educational leadership emanates. Thus, I unconventionally begin my dissertation by narrating my leadership story from the margins.

### **Ordained and Obedient**

My first assignment straight out of the Jesuit seminary was to be the school director of a small Catholic mission high school in the mountainous regions of the Southern Philippines. I received the official appointment on the actual day of my ordination, and I had about a month after that day to go and report for “duty.” Despite my initial apprehension, I was eager to obey my superior and optimistic to start my pastoral years as a young missionary priest sent to the frontiers.

### **The Mission**

As soon as I entered the campus and met with some of my lay colleagues for the first time, I began to realize how enormous my task would be as a first-time school administrator. I had very little know-how of the actual responsibilities that I was sent to perform, and I was very cautious and reluctant in challenging the school’s status quo even though intuitively, I knew that there was something amiss with its operations. I had a sense that the issues in this school were not just limited to our dilapidated facilities and inadequate staffing. I doubted, though, if I had what it took to turn the institution around. Jesuit school directors, like me, had come and gone for almost 30 years, after all, but the school still seemed to fall short in reaching its goal to be a

dynamic and equitable learning community for the holistic education of the youth in this part of the Philippines.

Like most educational institutions in the countryside, this school simply complied with the prescribed mainstream curriculum mandated by the national Department of Education (DepEd). The faculty and administrators did not see any urgent need to reform the school culture and programs to address the learning gaps of struggling students, especially those who came from non-traditional “tribal” elementary schools in the highlands. Indeed, one-third of the student population, almost a hundred students, came from the indigenous peoples or IP communities (*Lumad* or minority ethnics) who, even though having their own rich cultural traditions and values, were unfortunately given only token support and recognition by the school.

### **Marginalized**

The silencing of the marginalized voices by the dominant culture, while they may often go unnoticed, became quite apparent to me in an incident that involved one of the school administrators and an IP student. The pupil came from an isolated agricultural village. He and three other siblings were abandoned by their father when he was seven, and soon after, his mother also left the country to work as a domestic helper in the Middle East. His grandmother, a widowed peasant-farmer who tilled a patron’s land for less than minimum wage, watched over them. Our village parish priest, out of pity, invited this young student to stay at a dormitory for “*Lumad* scholars” whose educational and personal needs were supported by the parish that year.

One day, I saw this pupil storming out of the principal’s office. I was told that, in front of some students and teachers, he was strongly reprimanded for “repeatedly violating the uniform code of the school by not wearing his ID properly.”

I caught up with him outside the campus. In between sobs, the student protested: “Why do administrators always pick on me for the littlest of things? Teachers think I’m no good! And why do they blame my tribe and say I’m a troublemaker, just because I’m a *Lumad!*”

Even as I was able to talk with the administrator later that day, sought for clarification, and reminded her to express greater sensitivity when dealing with our students, the damage was done. The student never seemed to have recovered from that incident. He eventually dropped out.

### **In Need of Transformation**

I felt that the mission high school where I was assigned was in drastic need of reforms. A good number of the students, in my assessment at that time, were not learning enough from teachers who were poorly motivated and lacked credentials. Worse, those students who were coming from the cultural minority—those to whom the Jesuits were trying to reach out and “serve” by establishing mission schools to begin with were marginalized further by the school’s very own personnel.

I was appalled yet felt quite helpless to make any significant changes. My ineptitude at that time embarrasses me even now. My words of consolation to the aggrieved student were empty platitudes. Worse, my inability not just to correct my fellow administrator but also to make structural and systemic changes that would ensure that such incidents never happen again was indicative of my leadership failure. I knew that I would not have all the answers to our problems, but right there in the peripheries, I truly wished I could have done more to break the cycle of iniquities. The reality was, I too felt neglected at that time in the margins—unprepared to be the transformative educational leader that I had hoped to be.



# CHAPTER 1

## INTRODUCTION

### **Background of the Problem**

I believe that my story resonates with others too. Some priest-educators may have also felt passionately compelled to be transformative educational leaders in challenging school contexts but have been frustrated with their lack of purposeful preparation to do so.

### **Formation Gap**

Out of a necessity to urgently fill-in organizational positions, some Catholic bishops or religious superiors have assigned priests to lead parochial schools despite the pastors' lack of administrative preparation (Boyle & Dosen, 2017; Boyle, Haller, & Hunt, 2016; Okochi, 2009). In some cases, it took less than five years after priestly ordination for a Catholic clergyman to be appointed both as a pastor in the parish and head of a parochial school even without much educational leadership expertise (Okochi, 2009). In the Philippine Jesuit context, a review of the religious order's listing of men sent to various ministries from 2013 to 2019 would show that several young priests, who have just completed basic seminary formation within a year or two, have already been assigned to the mission district in the Southern Philippines to lead rural parishes and schools (Jesuit Philippine Province, 2013, 2014, 2015a, 2016b, 2017, 2018, 2019). Those who were appointed to be school directors in mission schools in this area might arrive and work at their respective schools with little practical and effective educational leadership knowledge and skills if their seminary formation did not have any intentional and purposeful educational leadership formation program to prepare them as school leaders (Boyle & Dosen,

2017). This reality was quite ironic, especially in the case of Jesuits, who seemed to have a propensity for establishing and running transformative schools worldwide (Mesa, 2013).

### **Leadership Gap**

The high schools managed by Jesuits do not merely impart academic knowledge and practical skills that prepare their students for college or employment. They are meant to be vibrant, mission-oriented learning communities that aspire to educate future servant leaders—men and women for and with others—persons who are holistically formed and inspired to live out their Christian faith that hopes and works for justice (Arrupe, 1999; Kolvenbach, 2008). For such schools to thrive, their administrators and teachers must not only possess Ignatian values and instructional competence, they must also share an institutional focus and concern for those students who suffer inequalities (Furman, 2012). The school leaders need to be models of what it takes to be educators for social justice (Chubbuck, 2007). They need to be ready and able to take on the extraordinary leadership demands of working for the schools’ sustainability and their students’ exemplary education, even amidst very challenging circumstances (Branch, Hanushek, & Rivkin, 2013; Keys, Hanley-Maxwell, & Capper, 1999).

To be sure, Jesuit educational leaders must be clear about the driving force behind the establishment of Jesuit sponsored schools: when the Jesuit ministry of educating the youth is carried out within the Ignatian purview of proclaiming faith from which justice springs forth, it ought to contribute significantly to “the total and integral liberation of the human person” (Society of Jesus, 1975, decree 2, para. 11).

## **Urgent Context**

The mission-focused responsibility becomes even more exigent (Baring, 2011; Baring & Cacho, 2015; Boyle et al., 2016; Clarke, 2002) when the context of such schools is similar to those in the Southern Philippines where majority of the students come from very low-income and often culturally marginalized communities (Jesuit Philippine Province, 2016a; Philippine Statistics Authority, 2017). In such schools, pressing and complex issues of social inequities affect the academic performance of the students and stunt their human growth (Baring & Cacho, 2015; Furman, 2012).

The Jesuit mission high schools were supposedly established in these remote rural areas to address the need for a high-quality secondary Catholic education that was within reach of students from families of very limited resources (Arcilla, 1978; Jesuit Philippine Province, 2016d). By improving the quality of the students' learning and upholding their dignity in and outside the classrooms through educational inclusivity and equity, mission high schools are tasked to champion the Catholic social ideal of a preferential option for the poor. This becomes an essential element of their schools' identity and mission (Catholic Educational Association of the Philippines & PPH Educational Foundation, 2016; Gutiérrez, 2009; McKinney, 2018). Given this context, social justice leadership becomes a vital trait and function of these schools' administrators and teachers (Bogotch, 2000; Jean-Marie, Normore, & Brooks, 2009).

### **Statement of the Problem**

School leadership remains one of the indispensable factors in making sure that Jesuit sponsored institutions can provide excellent education for all their students. The question then is: how are Jesuit leaders prepared to take on such a responsibility?

## **Lack of Purposeful Preparation**

There is an evident need to set up structures and programs that adequately prepare and support school leaders, both Jesuits and their lay colleagues, for their important functions in the Jesuit schools (O’Connell, 2007). Administrators and faculty must become skillful at “promoting the learning, achievement, development, and well-being of each student” (National Policy Board for Educational Administration, 2015, p. 3). School leaders also need to be discerning and active agents of change, capable of bringing people together to collaboratively and creatively work in undercutting the oppressive and usually, insidious structural injustices in their schools (Young, 2013). Further still, they must be culturally responsive and critically aware of complex social realities that affect the capacity of their institutions to provide quality education for all their students, especially those who are economically disadvantaged and culturally ostracized. This critical consciousness, when integrated with Ignatian reflection and spirituality (Coghlan, 2005), can further lead to the development of capabilities that are necessary for an ongoing praxis for social change in and through their school leadership (Freire, 1998, 2005).

## **Jesuit Educational Leaders**

Jesuit educational leaders, in a unique way, need to be deeply immersed in the Ignatian spirituality that allows them to see their social stature and administrative position as integral to their humanizing vocation as Catholic educational administrators in their schools (San Juan, 2007). Their Christian worldview of ministering in educational institutes can be accompanied and even enriched with a rightful appropriation of Freirean principles of critical consciousness, dialogue, and praxis (Chubbuck, 2007; Freire, 1998, 2005). An intentional leadership formation program with this paradigm is crucial and strategic in preparing transformative educational

leaders who are sensitive to today's critical realities and at the same time, capable of harnessing the liberating power of Catholic education that hopes to make a positive difference in their students' lives (Boyle & Dosen, 2017; O'Connell, 2007).

However, well-meaning Jesuit superiors, who admittedly work with a limited pool of available and trained priests, are often constrained to choose young and inexperienced Jesuits to serve in the demanding ministries in the peripheries. These "baby priests," (as they are fondly called in the Society of Jesus) often arrive at their posts hopeful, idealistic, and passionate but without much educational administrative training and experience. Without a lack of preparation, they soon struggle and need support as they discover how incredibly challenging it is to work for sustainable changes in strengthening their educational institutions and advancing their students' academic learning and holistic growth (Boyle & Dosen, 2017; O'Connell, 2007).

A team of researchers in Australia who interviewed educational leaders in small schools comparable to the mission schools in the Southern Philippines, observed that the "preparation for leadership in Catholic schools to be inadequate both in terms of formal academic training and leadership experience" (Belmonte & Cranston, 2007, p. 24). Belmonte and Cranston (2007) also cited several studies in the past that have shown how "formal leadership preparation for leadership for small schools was often reactive, fragmented, or at worst, non-existent" (p. 24). Thus, most of these small-school leaders felt that they were "thrown in at the deep end" (Clarke, 2002, p. 9), and perceived that their most noteworthy professional learnings were only those that they had fortuitously acquired "on-the-job and by trial and error rather than through systematic formal professional development activities or academic study" (Belmonte & Cranston, 2007, p. 24). The same can be said about Jesuits serving as school directors in mission high schools in the

Philippines. These clergymen may have been trained to be good pastors, but not necessarily socially just educational leaders (Boyle & Dosen, 2017).

### **Research Questions**

Looking at the predicament of first-time school directors and seeing how an appreciation of their leadership principles and practices would have noteworthy implications for the formation of their confreres who in the future might also be sent to lead similar schools, I wanted to understand and describe the educational leadership experiences of young Jesuits and the kind of preparation they received prior to their assignments as administrators in mission high schools. To do so, I sought answers to the following questions:

- What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?
- What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders?

### **Purpose**

The primary purpose of this research was to study carefully the leadership experiences and the kind of preparation that Filipino Jesuits received to be leaders of mission high schools in the Southern Philippines. The close examination of their experiences and reflections would inform the recommendations to improve the educational leadership formation program in the Philippine Jesuit scholasticate (seminary). Such proposals would include the modification of the curriculum, pedagogy, and assessment processes in order to highlight the need for Jesuit

formands, who would lead mission schools in the future, to develop critical consciousness, administrative knowledge, and managerial skills in the seminary formation.

### **Significance**

This study was significant in multiple ways. First, the learning drawn from the leadership experiences and insights of Jesuit school administrators from the mission schools helped inform possible changes in the seminary's curriculum and pedagogy, as well as the Jesuit seminarians' evaluation processes. As such, this research advocated for a purposeful educational leadership preparation (Boyle & Dosen, 2017) towards the end of the Jesuit scholasticate which would equip even newly ordained Jesuit priests with the proper disposition, sufficient knowledge, and appropriate skills essential in their first years as administrators (U.S. Jesuit Task Force on Formation and Leadership, 2009) in mission schools.

Second, considering the possible usefulness of the study to multiple audiences, it could be feasible to create ripples of improvements in similar religious institutes who sponsor or run Catholic schools for underprivileged students. Other missionary congregations, who operate schools similar to Jesuit mission high schools, could gain some helpful insight for their own leadership preparation programs for their seminarians or women religious in formation (Boyle & Dosen, 2017).

Lastly, this research added to the scant academic literature on the educational leadership preparation of Catholic clergy, especially those who lead schools for the disadvantaged youth. One must note too that not much research had been done in this specific field of educational leadership formation (Boyle & Dosen, 2017) particularly in the context of developing countries such as the Philippines.

## **Conceptual Framework**

For this investigation, I relied on a conceptual framework originally proposed by Capper, Theoharis, and Sebastian (2006). It was slightly modified to accommodate some Ignatian educational principles elaborated by the former Jesuit Superior General, Fr. Peter Hans Kolvenbach, S.J. (2005).

### **Evaluating and Developing Leadership Preparation Programs**

Capper et al. (2006) proposed a set of criteria that may be helpful in promoting and assessing the effectiveness of educational leadership programs that focused on social justice. After a comprehensive review of the available literature on educational leadership preparation programs, Capper et al. (2006) identified three domains that specifically focused on social justice leadership competencies: critical consciousness, knowledge, and practical skills. These social justice leadership domains were developed through a purposeful curriculum, an intentional pedagogy, and a meaningful evaluation process (Capper, Theoharis, & Sebastian, 2006).

In the formulation of their framework, Capper et al. (2006) were cognizant of critical pedagogical principles which valued the process of conscientization, dialogue, and praxis (Berkovich, 2017). Moreover, Capper et al. (2006) emphasized the need to create and maintain a learning environment “where students experience a sense of emotional safety that will help them take risks toward social justice ends” (p. 212). Figure 1 shows the various elements of the educational leadership for social justice preparation framework developed by Capper and her associates (2006).



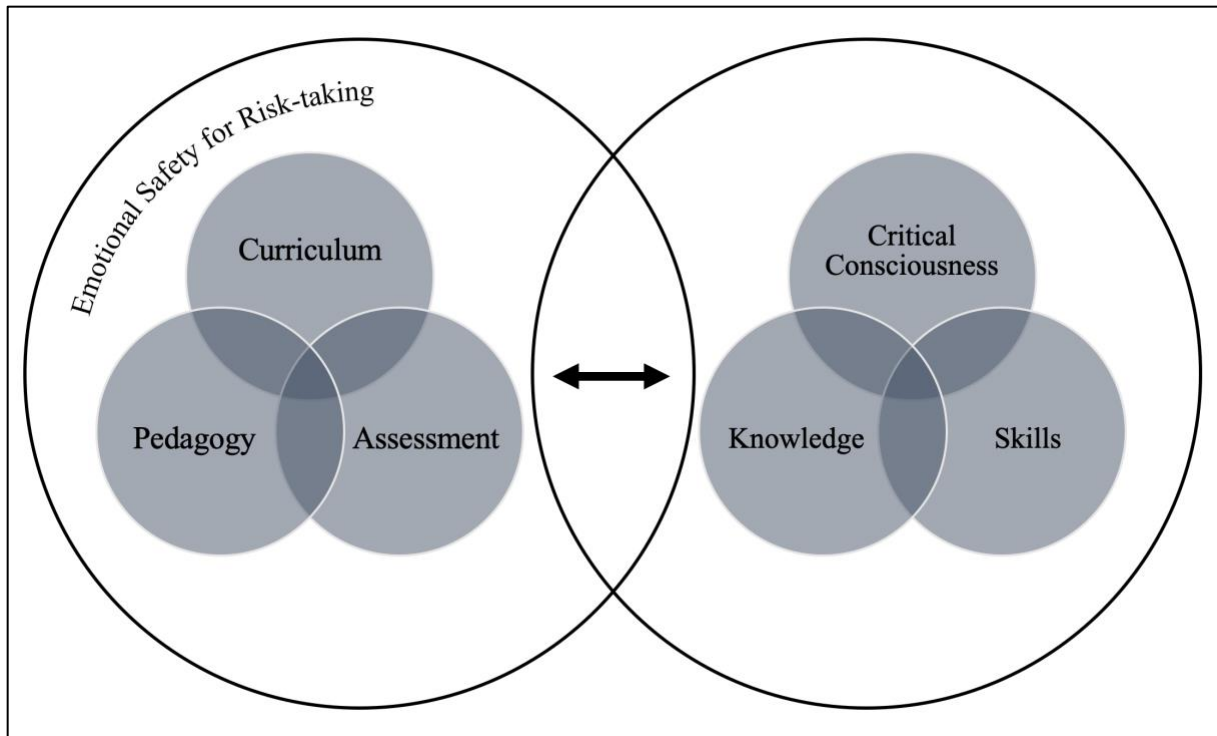


Figure 1. Capper, Theoharis, Sebastian Framework for preparing educational leaders for social Justice. This grid shows a conceptual framework for preparing educational leaders for social justice. Reprinted from “Toward a Framework for Preparing Leaders for Social Justice,” by C.A. Capper, G. Theoharis, and J. Sebastian, 2006, *Journal of Educational Administration*, 44(3), p. 220. Copyright 2006 by the Emerald Group Publishing Limited all rights reserved. Reprinted with permission.

### **Incorporating Ignatian Principles**

Looking at these elements from the perspective of Ignatian spirituality, which also values the ethical dynamics of concern for others and the positive transformation of the world (Coghlan, 2005) albeit from an overtly Catholic Christian perspective, it is not difficult to apprehend a sense of intersectionality between the critical pedagogy-based framework of Capper et al. (2006) and the Ignatian Pedagogical Paradigm (IPP)<sup>1</sup> in Jesuit-run schools (Chubbuck, 2007). The interrelated elements of the IPP (i.e., context, experience, reflection, action, and evaluation) could be appropriated to any program of learning as long as the manner and process of educating

<sup>1</sup> The Ignatian Pedagogical Paradigm or IPP is the characteristic manner or process of teaching and learning in Jesuit-run schools. It typically involves the five interrelated elements of (a) context, (b) experience, (c) reflection, (d) action, (e) evaluation (Kolvenbach, 2005).

students enacted the characteristics of a Jesuit education in their lives (Chubbuck, 2007; Coghlan, 2005).

Capper et al.'s framework (2006) can, therefore, be adjusted in order to accommodate what Kolvenbach (2005), has articulated as the aim of the distinctive Ignatian pedagogy in Jesuit schools; that is: "to form leaders in service, men and women of competence, conscience, and compassionate commitment" (p. 1). Figure 2 shows how the framework of Capper and her associates (2006) can integrate the aims of Jesuit education as parallel to the key domains of forming educational leaders for social justice: (a) developing critical consciousness for forming the conscience, (b) increasing leadership knowledge for enhancing competence, and (c) building skills for fostering compassionate commitment.

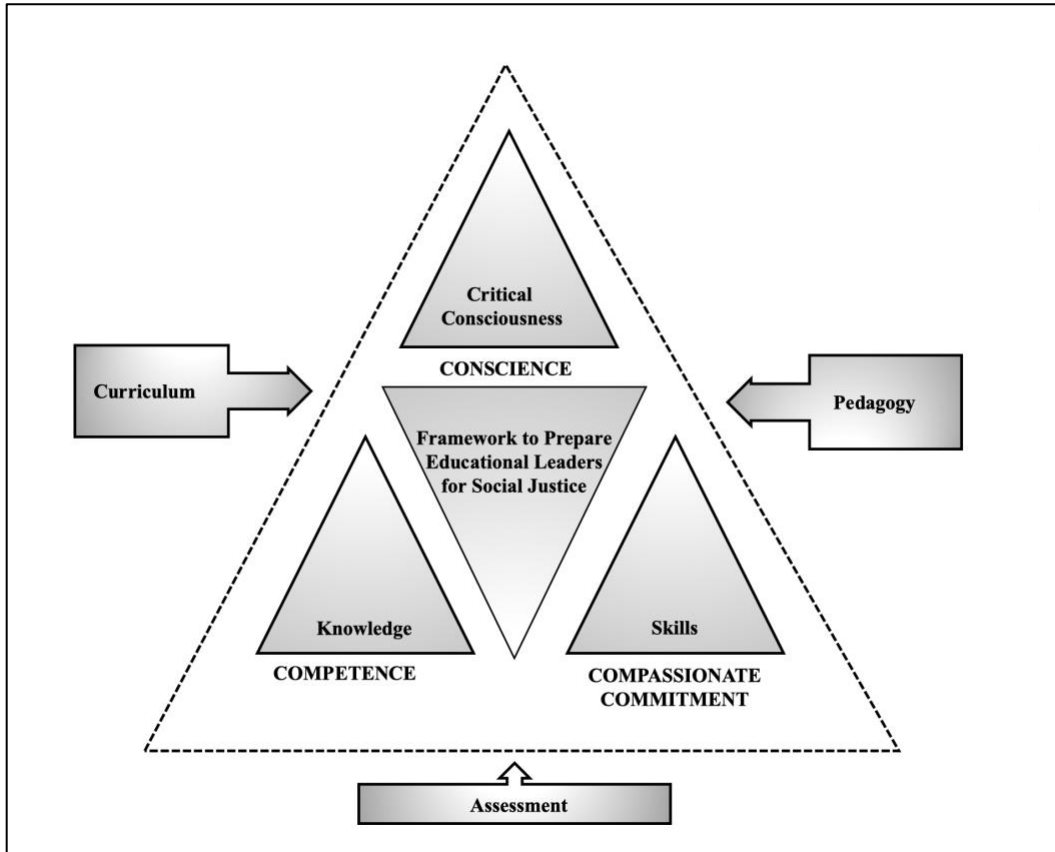


Figure 2. A conceptual framework for preparing Jesuit educational leaders for social justice. This figure shows how the original elements of Capper et al's (2006) leadership preparation framework can align with the Jesuit education goals of conscience, competence, and compassionate commitment. Adapted from "Toward a Framework for Preparing Leaders for Social Justice," by C. A. Capper, G. Theoharis, and J. Sebastian, 2006, *Journal of Educational Administration*, 44(3), p. 220. Copyright 2006 by the Emerald Group Publishing Limited, all rights reserved. Also adapted from "Jesuit Education and Ignatian Pedagogy" by P. H. Kolvenbach, 2005, paper presented at the Association of Jesuit Colleges and Universities. Retrieved from <https://www.xavier.edu/jesuitresource/resources-by-theme/documents/jesuit-education.pdf>.

### A Modified Framework

With the intention of drawing meaning from the leaders assigned to lead in schools for underserved students in the Southern Philippines and gathering their insights to gain a contextualized appreciation of the Jesuit formation that was pertinent to them and their educational ministry, I used in this research the modified framework presented above.

Thus, I adapted the conceptual framework developed by Capper et al. (2006) to include the key objectives of the IPP that agreed with the epistemology evident in the scholastic formation of Jesuits: the development of the leader's conscience (i.e., Christian virtues and dispositions), competence (i.e., knowledge), and compassionate commitment (i.e., skills; Jesuit Conference of Asia Pacific, 2011; Kolvenbach, 2005; Secretariat for Education of the Society of Jesus, 2015; U.S. Jesuit Task Force on Formation and Leadership, 2009). With these leadership capacity domains, an understanding of the kind of Jesuit seminary leadership formation was developed since it could be related to this model's programmatic components: curriculum, pedagogy, and evaluation processes (Capper et al., 2006).

Thus, Capper et al.'s (2006) educational leadership areas of development were aligned with Kolvenbach's (2005) distinctive goals of Jesuit education. Capper et al. (2006) specified that "critical consciousness" (p. 213) was what literature referred to as the leader's disposition, while Kolvenbach (2005) referred to a similar goal of forming the student's Christian "conscience" (p. 1). Capper et al. (2006) then explicated that by acquiring "knowledge," a leader for "social justice needs to know about evidence-based practices that can create an equitable school" (p. 213). Kolvenbach (2005) analogously viewed how Jesuit education can be an effectual manner of disciplined and rigorous study that guide the development of the student's "competence" (p.1). Lastly, when Capper et al. (2006) specified the third leadership dimension as "skills," they understood this to refer to "what the leader actually can do" (p. 213). Likewise, Kolvenbach (2005) expressed the mission-oriented dimension in Jesuit education as the formation of the student's "compassionate commitment" (p. 1) to work for the common good

and to serve one another. A more detailed explanation of this modified conceptual framework will be provided in Chapter 2 and will be applied to the recommendations in Chapter 5.

### **Design and Method**

This investigation followed a qualitative phenomenological research design (Groenwald, 2004) that intended to collate and describe the lived leadership experiences of Jesuit school directors as they narrated and presented them.

#### **Phenomenological Study**

This phenomenological research used a combination of qualitative data gathering methods (i.e., pre-interview questionnaires, semi-structured interviews, on-site observations, focus group discussions, and document analysis). These tools were designed to focus on the chosen participants' experiences in the mission schools as regards their leadership consciousness (i.e., thinking /disposition), knowledge (i.e., expertise), and skills (i.e., management) and how these were influenced by their Jesuit seminary formation (i.e., content, delivery, and assessment).

#### **Participants**

Through purposeful sampling, I initially selected eight possible participants. Seven eventually agreed to participate ( $N = 7$ ). All participants underwent the standard basic Jesuit scholastic formation within the last 20 years and were either newly ordained or within two years since their priestly ordination when they were missioned by their superiors to lead their respective schools. Moreover, none had any prior experience in leading other educational institutions as school directors or presidents.

## **Site Location**

I conducted the study in a rural province in Mindanao of the Southern Philippines. The four mission schools, where the participants are either the current or previous school directors, offer secondary education (i.e., grades seven to 12) to students who mostly came from low-income families and indigenous communities (Jesuit Philippine Province, 2016a, 2016b; Philippine Statistics Authority, 2017). Except for one school whose property was still owned by the Society of Jesus, the locations of the three other schools were within parishes that were currently owned by the local Catholic diocese. As such, the bishop of the diocese sat as the chairperson of their school boards. These three schools were also affiliated with the diocese's association of Catholic schools whose superintendent and assistant superintendent also convened as members of their respective boards.

The lone Jesuit-owned mission school had a board composed of three Jesuits and two religious sisters. All the mission schools followed a School Director/President–Principal administrative model. The provincial superior of the Society of Jesus in the Philippines chose and assigned Jesuits to lead these institutions as directors in indeterminate term lengths. The bishop of the diocese received the appointees and confirmed them as a ministerial act.

## **Limitations of the Study**

I conducted this research under specific assumptions related to the particular scholastic formation and the educational ministry of Jesuits in the Philippines. Moreover, I was aware of the restricted scope of my research and other limiting factors, over which I had no control during my study.

## **Assumptions**

I grounded my research on the assumption that the Jesuit educational ministry to the geographical and socio-cultural peripheries of the Philippines has remained to be an important service that the members of this religious order would wish to offer with greater efficacy in the coming years. The local leadership within the Society of Jesus has recognized and stipulated this apostolic priority in the Philippine Province Road Map of 2016 (Jesuit Philippine Province, 2016d). More recently, the Jesuit leadership also affirmed how the work in the mission schools align with the Society of Jesus' Universal Apostolic Preferences.<sup>2</sup>

Furthermore, the Jesuit seminary formation that the participants referred to in this study was the training that they received mostly in the scholasticate in Metro Manila before their ministry in the mission schools in the Southern Philippines. Their formation period roughly spanned from 1999 to 2017. I also assumed that the formation program is adaptable and responsive to the current apostolic needs of the Society of Jesus. In relation to this, the insights drawn from this study can inform, support, and strengthen the Jesuit formation notion that proficiencies for “leading individuals are necessary for all Jesuits and that skills for leading organizations are necessary for some” (U.S. Jesuit Task Force on Formation and Leadership, 2009, p. 52) who could eventually be missioned to such functions. This research, therefore, upheld the conviction that educational leadership “skills can [indeed] be defined and taught

<sup>2</sup> After a series of discernment in common in various Jesuit communities for 16 months, the Superior General, Fr. Arturo Sosa presented to Pope Francis four universal apostolic preferences for the worldwide ministries of the Jesuits: (a) Showing the way to God through St. Ignatius' Spiritual Exercise, (b) walking with the poor and excluded in a mission of reconciliation and justice, (c) accompanying young people to a hope-filled future, and (d) caring and protecting God's creation (Sosa, 2019).

through an intentional and sufficiently resourced program that includes clear expectations and rigorous accountabilities” (U.S. Jesuit Task Force on Formation and Leadership, 2009, p. 52).

### **Limitations**

With the specificity of the Jesuit participants’ areas of ministry and periods of formation, the findings of the research were not necessarily reflective of the experiences of other Filipino priests. Moreover, the formation programs of the Society of Jesus as a worldwide Catholic religious order, though following similar structures and general objectives, have different and contextualized implementation strategies and emphases in individual Jesuit provinces or regions in the world. Thus, I had to be circumspect in talking about other Jesuit provinces’ or regions’ formation programs and practices and judicious in comparing or differentiating them directly to that of the Philippine province. The generalizability of the results and the universal applicability, therefore, of this study was inherently limited.

Also, as a Filipino Jesuit researcher, I adopted an emic perspective in this study. Admittedly, certain biases in the collection and reporting of the data might have been present. Thus, to address this concern, I put in place various strategies to safeguard the research validity and reliability (c.f. Chapter 3).

### **Delimitation**

Although technically, there are a few men in Jesuit formation who are not necessarily training for priesthood but have a vocation to religious brotherhood, I focused my research on the more common seminary track formation that prepares scholastics for ordained priestly ministry.

As of 2020, there were also five schools for the underserved students which have been associated with the Jesuits in the Southern Philippines. This research, however, included only the



four mission high schools listed in the 2019 Philippine province catalogue (Jesuit Philippine Province, 2019). In the last five years, all four mission high schools have received newly ordained or young Jesuit priests who served as their novice school directors.

The only Jesuit educational institution within the mission area that I excluded in this study was a community-based school which, in 2004, initially offered literacy and adult education programs specifically for indigenous peoples within its locality. Since the school year 2015-2016, it has gradually expanded into a full primary and secondary academic institution. This school is an offshoot venture of a university-based Jesuit institution involved primarily in research and training projects which promote environmental sustainability. It has not received any newly ordained priests to be its school director since its inception. Although the long-time head of the research institute is a Jesuit priest, he only provides some administrative guidance to the school's local leaders when needed.

Given the constraints of time and material resources, I also chose to focus only on the perspective of current and past Jesuit school directors in the four mission high schools. Although I could glean the intentions and the beliefs of other Jesuit educators, formators, and superiors from the various documents about Jesuit formation and educational ministry, I did not attempt to solicit deliberately their view on the issues discussed in this research. In addition, the study's methodology did not provide for explicit means to listen to the lay colleagues, especially women leaders, as well as the students of the participants in this study. Although their thoughts and insights were valuable, there were far too much data that could be efficiently collected, much less analyzed through a study that had to be accomplished within a year by a single researcher. I acknowledge, however, that future studies can appropriately include the perspectives of other

stakeholders deemed relevant in the formation of the Jesuit clergy as educational leaders for social justice.

Thus, the results of this current research are valuable resources about insights into educational leadership formation: first, within the Society of Jesus in the Philippines, and albeit on a limited extent, to different male and female religious orders and clergy who are also actively involved in the educational ministry in the Philippines.

### **Definition of Terms**

In order to facilitate a smooth flow of discussion, I shall briefly define some terms that are used in this paper that may be unfamiliar to some of the readers:

- *The Society of Jesus* is a world-wide Roman Catholic male religious order. It was founded by St. Ignatius of Loyola in the mid-sixteenth century. Its members are called Jesuits. Each administrative region of the Society is called a province, where a provincial superior leads and assigns members to various local ministries (Cross & Livingston, 2005; Jesuit Philippine Province, 2005).
- *Jesuit scholasticate or seminary formation* refers to the period of formal training that each member of the Society of Jesus goes through to prepare him for ordained ministry. Usually, this ranges from 10 to 12 years depending on the Jesuit province. In the Philippine Jesuit province, the basic formation leading to priestly ordination consists of the following stages as indicated in the Jesuit Formation Guidelines (Jesuit Philippine Province, 2005):
  - *Pre-Jesuit Stage—Candidacy Program* (five months to two years) purposively exposes a candidate (usually at least a college graduate) to the Jesuit

community and apostolic life and prepares him to apply for the novitiate (Jesuit Philippine Province, 2005).

- *Novitiate* (two years): After passing a rigorous application process, a Jesuit novice goes through a 30-day silent retreat or the St. Ignatius's Spiritual Exercises. He also embarks on several "experiments" and workshops to deepen his understanding and appreciation of his Jesuit vocation. After this intensive structured formation, he is assessed to see whether he is fit to pronounce perpetual vows of poverty, chastity, and obedience. He is then called a scholastic (if he is being trained to be a priest) after this stage of formation (Jesuit Philippine Province, 2005).
- *First studies* (two to three years) is the stage when the Jesuit scholastic is asked to take courses in humanities and communication as well as philosophy in a formal university setting (usually at the Ateneo de Manila University). He lives with other formands and formators (and professors) in a formation house called a scholasticate. Besides academic studies, he is usually given other apostolic responsibilities that may be related to vocations promotions, communications, and socio-pastoral community organizing (Jesuit Philippine Province, 2005).
- *Regency* (two to three years) is the formation stage when the scholastic is usually given a teaching assignment in one of the well-established Jesuit secondary schools in an urban center (i.e., Metro Manila, Cebu City, Davao

City) and is asked to live in an apostolic community with other Jesuits who are engaged in various ministries.

- *Theology* (four years) is the formation stage when the scholastic goes back to the scholasticate and studies theology (e.g., Loyola School of Theology) to prepare him for the diaconal and priestly ordinations. He is also given socio-pastoral ministries that allow him to engage Catholics from less privileged communities at least every weekend. He takes a comprehensive theological exam at the end of this period. Finally, he undergoes a stringent academic and personal evaluation or scrutiny before he is approved for priestly ordination and missioned by the provincial to any ministry in need of a Jesuit priest.
- *Tertianship* (six to seven months) is the final stage of Jesuit formation when a Jesuit, having served for several years as a full-time ordained minister (if the Jesuit is a priest), goes through a “refresher” program similar to that of the Novitiate. After this stage, he is once again assessed thoroughly before he is approved to profess his final vows.
- *Mindanao* is the second largest island in the Philippines (Rodil, 1990). In this dissertation, it is also referred to as the Southern Philippines.
- *The Lumad or the Indigenous Peoples (IP)* are the 18 to 27 ethno-linguistic groups which are indigenous to the Southern Philippines. They are commonly referred to by outsiders as “Non-Muslim” natives. They, however, call themselves by their tribal designations (i.e., *Bukidnon, Higaunon, Mandaya*, etc.). Although some have been

baptized as Christians, a good number still adhere to their pre-Hispanic beliefs (Aligan, 2015; Rodil, 1990).

- *Jesuit missions* are rural areas where Jesuit missionaries are sent as pastors in order to establish or strengthen a Catholic community in the locality. Usually, mission areas are remote places where basic services such as education and health care are very limited. In the Southern Philippines, the Jesuits are engaged in socio-pastoral, educational, and spiritual ministries in parishes, high schools, and a retreat house (Jesuit Philippine Province, 2016a).
- *Mission high schools* are secondary education units (i.e., seventh to 12th grades in the Philippine education system) located in mission areas. Traditionally, each school is attached to a parish (e.g. parochial school) and owned by the local diocese. Nonetheless, mission schools operate independently of the parishes. These schools are highly reliant on subsidies and grants coming both from the private and public sectors. They follow a president-principal model where the president (or school director) is usually a Jesuit priest and the principal is a layperson or a religious sister from a local congregation (Jesuit Philippine Province, 2016a, 2016d).
- *School Director* is a title synonymous to “school president.” He is the Jesuit assigned by the provincial superior to be the head administrator in a mission high school (Jesuit Philippine Province, 2017).

## **Organization of the Dissertation**

This dissertation in practice began with a personal prologue and ends with a reflective epilogue about our common responsibility to strive for social justice in our schools. There are five main chapters in between.

Chapter 1, as I have presented here, introduced and contextualized the study. Chapter 2 looks at the existing literature related to this research. It begins with a presentation of what Jesuit education is and its transformative relevance in our society. It then moves to a discussion of the kind of formation program that Jesuits go through to lead Jesuit educational institutions. From there, I present various literature about educational leadership. This chapter ends with a review of studies that are related to specific kinds of educational leadership preparation that have social justice as their focus. Chapter 3 presents in detail the design and methodology that I employed in this research. It explains the phenomenological research approach that utilizes various data gathering tools. This chapter also specifies how I drew meaning from the data that I gathered from the field. Chapter 4 deals with the main research findings that adequately answered the two research questions posed earlier. Chapter 5 then presents a further discussion of the findings concerning previous research and the conceptual framework of this study. The fifth chapter proposes possible change initiatives in the Jesuit formation policies and practices that are related to the educational leadership preparation of the Filipino Jesuit clergy. The chapter ends with suggestions for future study and some concluding remarks.

## **CHAPTER 2**

### **REVIEW OF LITERATURE**

#### **Introduction**

This chapter covers the relevant literature that will further support my research. I begin with a discussion of the Jesuit education apostolate. After this, I examine the Jesuit basic seminary formation that is ideally meant not just to be spiritually formative for future Jesuit priests but apostolically oriented. I then proceed with a review of studies about educational leadership—what it is and why it matters to the sustainability of schools and the success of their students. This topic dovetails to an explication of the kind of educational leadership that advocates for social justice—a manner of administration that is suitable to the needs of the mission high schools with challenging environments. Finally, I delve into studies about the intentional preparation programs for educational leaders for social justice.

#### **The Jesuit Education Apostolate**

In this initial section, I write about the beginnings and development of the Jesuit education apostolate, as well as its significance for social change, particularly in challenging contexts such as those in the mission high schools in the Southern Philippines. I explore the relevance of today's "brand" of Jesuit Catholic education that does not aspire merely for the academic excellence of its students but seeks to be a platform for social change.

#### **St. Ignatius's Apostolic Goal: To Help Souls**

When St. Ignatius of Loyola banded with nine other like-minded companions in 1540, he had no specific intention nor desire to set-up a worldwide network of schools (Boston College Jesuit Community, 2008; Mesa, 2013). St. Ignatius did not want to be inordinately affixed to a

single kind of ministry (O'Malley, 1993). That was why he and his confreres vowed to go anywhere in the world where there was an evangelical need to serve God by being of assistance in the salvation of people—to help souls (Mesa, 2013; O'Malley, 2008).

The phrase “to help souls” was almost like a mantra for St. Ignatius (Gray, 2008, p. 18; O'Malley, 2008). This conviction, however, became more than just a personal means to convert non-believers to Catholic Christianity. His belief gradually matured into a longing to be of greater service to more people on a larger and more organized scale through the Society of Jesus. The early Jesuits began to establish social institutions to expand the scope of their fundamental mission of helping souls (O'Malley, 2008). Soon, St. Ignatius discerned that one of the most expedient paths to serve people would be in and through schools, and that this direction was not at all incompatible with his original vision for their religious order (O'Malley, 1993).

### **Jesuits: The First Teaching Order**

The Jesuits were the first clergymen to be known as a teaching order who would inspire others to follow. Although in the Middle Ages, other religious men such as the Benedictines were guiding their fellow monks in the monasteries or the Dominicans and Franciscans were already preaching at the European universities, it was the Jesuits, in the mid-1500s, who systematically devoted their resources to formally make education a vital ministry for their order (O'Malley, 2008). They began educating in their schools, not just their scholastics or seminarians, but other young male students who were engaged in the world and had no aspiration of becoming clergymen (O'Malley, 2008). The Jesuits manifested their commitment to this noble endeavor by systematically allocating not just material capital but human resources (i.e., priests,



brothers, and scholastics) to minister in their schools and assume the chief responsibility for their institutions' vision, viability, and sustainability (O'Malley, 2008).

### **St. Ignatius's Spirituality and the Development of Jesuit Education Apostolate**

St. Ignatius was pleased with the beginnings of the education apostolate of the Jesuits. He felt "inclined toward the idea of educating youth in letters and matters of the spirit" (O'Malley, 1993, p. 201). It was, however, under the leadership of fellow Jesuits, Fr. Jeronimo Nadal and Fr. Juan de Polanco that this particular ministry took on a more formal structure in the Society of Jesus (Mesa, 2013; O'Malley, 1993). As historian Fr. John W. O'Malley, S.J. (1993) asserted, "Once the Jesuits undertook this ministry [education], they did not falter" (p. 201).

**Early institutionalization.** One of the most crucial steps towards the institutionalization of the Jesuit education ministry was the development and promulgation of the *Ratio atque Institutio Studiorum Societatis Iesu* (The Official Plan for Jesuit Education). The *Ratio Studiorum* (Plan of Studies), as it was more commonly called, described the specific vision and curriculum for the Jesuit secondary schools and universities some 50 years after the order's first venture into the educational field in Messina, Italy (Mesa, 2013). Woven into this document were the best practices of Jesuit education at that time—an eclectic mix of elements from various sources (O'Donnell, 1984; Mesa, 2013; O'Malley, 2008). As such, the text successfully steered the growing number of Jesuit schools around the globe to approach a distinctive brand of education by attempting to standardize their educational system (O'Donnell, 1984). It adopted the *modus parisiensis* or the University of Paris's pedagogy through which St. Ignatius and most of his first companions were rigorously trained academically (Mesa, 2013; O'Donnell, 1984; O'Malley, 2008). The early Jesuit schools then fused this manner of instruction with the 16th

century Italian humanism that placed much emphasis on *pietas*, the building of the Christian character of the students (Mesa, 2013; O’Malley, 2008; Society of Jesus, 1970). With the *Ratio Studiorum* setting the vision for Jesuit schools until the 19th century, the Jesuit educators’ mission was primed: that all their students “may acquire not only learning but also habits of conduct worthy of a Christian” (“*Ratio Studiorum* Common Rules for the Teacher of the lower Classes, No. 1” as quoted by Mesa, 2013, p. 177).

Almost five centuries later, the Society of Jesus, as of 2019, was responsible for 827 secondary and pre-secondary schools, 51,284 staff members, and 857,186 pupils across the globe (Educate Magis & International Commission on the Apostolate of Jesuit Education, 2019). Table 1 lists the different regions in the world where secondary and pre-secondary Jesuit schools have been established and are operational as of August 2019.

Table 1  
*Global Network of Jesuit Schools as of August 13, 2019*

Jesuit Governance Region	Number of Jesuit Schools
Africa and Madagascar	52
Asia-Pacific	44
Europe	187
Latin America	88
North America	82
South Asia	374

*Note:* Schools of secondary and pre-secondary levels are listed per Jesuit governance region (geographical clusters of Jesuit provinces). The data in this table have been collected from the “Global Network of Jesuit Schools: Secondary and Pre-secondary Map” by Educate Magis and International Commission on the Apostolate of Jesuit Education, 2019. *Interactive map of Jesuit schools. Educate Magis*. Retrieved from [https://storage.googleapis.com/educatemagis.org/Map/2019/ENGLISH/Large%20Maps/EM\\_Large\\_Map\\_ENGLISH\\_US\\_Rev03.pdf](https://storage.googleapis.com/educatemagis.org/Map/2019/ENGLISH/Large%20Maps/EM_Large_Map_ENGLISH_US_Rev03.pdf).

**Towards the present-day.** Much of the principles and pedagogy employed in Jesuit education today are rooted in St. Ignatius’s Spiritual Exercises—a set of prayers and meditations that he composed out of his spiritual conversion and journey (Boston College Jesuit Community, 2008; Kolvenbach, 2005; Schineller, n.d.). The close link between the Spiritual Exercises as a form of pedagogy and the distinguishing educational qualities of Jesuit schools have been the

subject of numerous studies that brought about a series of noteworthy documents that have strongly influenced today's Jesuit education apostolate (Mesa, 2013). *The Characteristics of Jesuit Education* (International Commission on the Apostolate of Jesuit Education, 1986) and *Ignatian Pedagogy: A Practical Approach* (International Commission on the Apostolate of Jesuit Education, 1993) are the two documents that have "updated" the *Ratio Studiorum* to modern times. These documents have provided the essential unity of language for the Jesuit schools across continents. They have informed their educational methods at a time when educational systems have been governed by complex "national standards and requirements that prevent the easy uniformity of the past" (Mesa, 2013, p. 178). It is these same guiding documents that characterize today's Jesuit education in the Philippines as it has weathered a long and arduous journey from the Spanish colonial era to the present-day political populism, economic inequalities, and cultural plurality in the country.

### **Jesuit Education in the Philippines During the Time of Colonizers**

Some scholars have argued that the Catholic Church was complicit in the efforts of the Spanish colonizers to subjugate the natives of the islands of the Philippines (San Juan, 1994). A critical review of the country's history has revealed the unfortunate reality of how the colonizers in alliance with the clergy used the evangelical apparatus of catechism, devotions, and religious sermons to justify the appropriation of land and other natural resources, as well as the imposition of multiple taxes and tributes and forced labor on the native Filipinos (San Juan, 1994).

The education system was also a battleground in which the colonizers had an early advantage: "the educational policies and practices of Spain created a dual system of education in the Philippines: catechism schools for Filipinos and academic schools duplicating those of the

Peninsula for Spaniards” (Schwartz, 1971, p. 218). It was through this thorny socio-political environment in the late 1600s that the early Jesuit missionaries in the Philippines cautiously navigated their way to stay on track with their evangelical and educational mission (Meany, 1956, 1981; O’Donnell, 1984).

### **The Spanish Colonial Influence on Jesuit Education**

At the behest of the two great powers at that time, the civil government and the Catholic hierarchy, an initial group of three Jesuit missionaries arrived in the Philippines on the 17th of September 1581 (de la Costa, 1959). As the Jesuit leadership in Rome realized the evangelical need and potentials of the new Spanish colony, they stipulated in 1595 that the Philippines be made a vice-province dependent on the Jesuit province in Mexico. They appointed Fr. Antonio Sedeño, S.J., as the local mission superior. As soon as more Jesuits came to shore, Sedeño wasted no time in inaugurating a small Jesuit college that accommodated the sons of the Spanish colonizers in the capital (Arcilla, 1978; de la Costa, 1959). The Jesuits and their reputation in their educational ministry grew gradually in renown. Eventually, they were able to transfer from the outskirts of Manila into the central part of the Spanish occupied city, the *Intramuros* (within the walls) through the generous endowment of wealthy Spanish patrons (de la Costa, 1959).

**Consolidating apostolic efforts and resources.** The trajectory was set for the Jesuits in the Philippines. They consolidated the support coming from the colonial government, the Church hierarchy, and affluent benefactors for the progress of their ministries. Thus, a few more years into the mission, Jesuit Superior General Acquaviva in Rome directed another Jesuit priest, Fr. Garcia, who had a wealth of administrative experience both in Peru and Mexico, to look into the possibility of prudently expanding the works in the Philippines (de la Costa, 1959). As this was

happening in the capital of the country, a few other Jesuits already started to sail south, particularly to the islands of Cebu, Bohol, Samar, and Leyte in the Visayas region. One of the tireless missionaries on the island of Leyte, opened a boarding school for boys that produced such excellent results that similar schools were modeled after it in Manila (de la Costa, 1959).

In 1605, less than a quarter of a century since the first Jesuit missionaries arrived in the Philippines, the Jesuit works expanded and were no longer dependent on Mexico. Fr. Gregorio López, S.J., became the first provincial superior in the Philippines, who led 67 men ministering in a school that offered secondary and higher studies, a residential college adjoined to it, seven mission residences, and two other mission stations outside the capital (de la Costa, 1959).

**The suppression of the Jesuits.** Despite decades of continued and successful ministry, the Jesuits were hastily expelled from the country by King Charles III of Spain in 1767. No precise reason was given for the Royal Decree. However, it was observed that the anti-Jesuit sentiment at that time was pervasive across monarchies in Europe. Some of the most influential autocrats then felt that the religious order had become too powerful internationally as it remained deeply loyal to the papacy while acting with significant autonomy from the monarchs in whose territory they ministered (Schumacher, 1987). Thus, the Jesuits' residences were raided and sealed. They were incarcerated, and their academic works confiscated (Arcilla, 1978; de la Costa, 1959). This crisis, which persisted for almost a century, nearly wiped-out the order in the Philippines (de la Costa, 1959).

**The road to recovery.** When royal animosity eventually died down, the Holy See and Madrid ratified a Concordat in 1851. Queen Regent Isabela II endorsed the royal *cédula* that officially brought back the surviving Jesuits to the country on the condition that they “promote

the prompt settlement of the pagans [*sic*] that lived in those islands,” (Arcilla, 1978, p. 21) particularly in Mindanao (Arcilla, 1978; de la Costa, 1959).

Almost as soon as the first cohort of men from the restored Society of Jesus had set foot on the Islands, the Spanish governor general, Don Fernando Norzagaray y Escudero asked the designated local superior of the group, Fr. Fernando Cuevas, S.J. to establish a new school in the capital and oversee the virtually obsolete *Escuela Pia* of Manila (Arcilla, 1978). He made this request upon the petition of wealthy and influential residents of Manila, who remembered the illustrious education that the Jesuits offered years back (Arcilla, 1978).

The Jesuits somewhat anticipated this request and so reluctantly agreed to this arrangement after approval from Rome was given. The missionaries’ hearts and minds, however, remained fixed in the Southern Philippines (Arcilla, 1978). They were very much aware of how previous missionaries failed to “evangelize the pagan [*sic*] tribes of the rugged east coast of Mindanao, the upper reaches of the Agusan River, the Davao hinterland or the Bukidnon plateau” (de la Costa, 1959, p. 86).

Those compelled with apostolic zeal and vigor for the evangelization of Mindanao trudged forward to the frontiers. They employed practically the same strategies that missionaries had used for the “Christianization of Bohol, Leyte and Samar two centuries earlier, [as] they penetrated far into the interior of the island and induced the semi-nomadic tribal peoples to settle down in stable farming communities” (de la Costa, 1959, p. 86).

Looking back at these missionary activities from today’s perspective, one might rightfully presume that evangelization went hand in hand once again with Spanish colonization. This manner of missionary efforts in the peripheries, however, would gradually change as the

Spanish colonial rulers were forced to relinquish their authority to the more secular American colonizers who upheld the separation of church and state (de la Costa, 1959).

### **The American Brand of Jesuit Education**

In 1926, decades after Spain had ceded the Philippines to the United States through the Treaty of Paris, the American Jesuits from the Maryland-New York Province came and began a new era of missionary work (de la Costa, 1959).

**Breaking free from colonialism.** The schools that were established by the American colonizers were very much like the schools in the United States, except that “while in the United States the administration of education rest[ed] largely on local authority, it [was] highly centralized in the Philippine Islands” (Counts, 1925, p. 97). Excluding the period of the Second World War, Jesuit education in the Philippines, particularly those in the centers, grew by leaps and bounds following the American model of education (Meany, 1956).

The famous Jesuit school in Manila was renamed to what is now called, “Ateneo de Manila,” the flagship university of the Jesuits in the Philippines (Meany, 1956). Six other Jesuit educational institutions of similar name emulated the very successful Jesuit university and were founded across the country: Ateneo de Zamboanga, Ateneo de Cagayan, Ateneo de Naga, Ateneo de Tuguegarao Ateneo de San Pablo, and Ateneo de Davao. Three of these were established on the island of Mindanao (i.e., Zamboanga, Cagayan, and Davao), realizing the earlier royal mandate that allowed Jesuits to come back to the Philippines after their suppression (Meany, 1956).

These Jesuit schools, much like during the time of the Spanish colonizers, struggled in the shifting and oppressive context of colonial regimes, even as they tried to ground themselves

on the liberating Ignatian principles found in the Society of Jesus' documents and tradition (Meany, 1981; O'Donnell, 1984). The Jesuits must have been mindful of the painful reality that during the Spanish colonial rule, "the educational system [in the Philippines] remained essentially an instrument for the perpetuation of the rule of Spain and of the domination of the church" (Counts, 1925, p. 97). They would have also seen how it was not much different from the schools during the American occupation as the education system also served as a tool for the cultural hegemony of the American colonizers who felt that they had an obligation to civilize the local population through the act of "benevolent assimilation" (David, 2013). Notwithstanding the laudable effects of education during this era, this manner of schooling further oppressed the Filipinos in the end (David, 2013).

### **Refocusing on the Mission: In the Service of Faith that Promotes of Justice**

As the Philippine Jesuits navigated their way through the convoluted socio-political and cultural conditions of the land, there was a recognition that their education apostolate was not merely an academic endeavor, and that it should never be an instrument of subjugation by any powers that be (Nebres, 1981).

### **Jesuit Education for the Common Good**

To be sure, the early Jesuits already had this in mind. Fr. Juan Alfonso de Polanco, S.J., who served as the Society's executive secretary from 1547 until 1572, drafted for his fellow Jesuits a list of reasons why the order must maintain its ministry in running schools (O'Malley, 2008). He stated that one of the critical justifications in establishing schools was to provide education for the disadvantaged who could not afford to pay for private tutors but had the potential to "grow up to be pastors, civic officials, administrators of justice, and will fill other



important posts to everybody's profit and advantage" (O'Malley, 2008, p. 53). In other words, the evangelical dimension of Jesuit schools that focused on the urgent need "to help souls" was not seen solely as a way to direct people, especially the young, to the "heavenly kingdom," but integrally included a profound concern for their well-being in the "earthly city" so that they, too, might contribute to the welfare of others (O'Malley, 2008, p. 53).

**Jesuit education for the emancipation of the oppressed.** A former president of the largest Jesuit university in the Philippines, Fr. Bienvenido Nebres, S.J. (1981) noted as well that this marked emphasis was the core message of Fr. Pedro Arrupe's much-quoted allocution, "Men-for-Others":

Education for justice has become, in recent years, one of the chief concerns of the Church. Why? Because there is a new awareness in the Church that participation in the promotion of justice and the liberation of the oppressed is a constitutive element of the mission which Our Lord has entrusted to her. (Arrupe, 1999, p. 1)

With its far-reaching impact, the Jesuit educational ministry, which categorically fosters the mission to promote faith in the service of justice, has become almost indispensable around the globe (Kolvenbach, 2008). Jesuit schools, whether they may be in the cities or rural areas, endeavor to educate young men and women and form them as people of proficiency, integrity, and kindness (O'Connell, 2007). It is with great conviction that Jesuits stand by the value of their education apostolate as a way to accompany people, most especially those who are left in the margins, to support their holistic development, so that they, too, may truly live their Christian vocation faithfully (Kolvenbach, 2008; Nebres, 1981).

**Jesuit schools for the underserved.** Through the centuries, there have been many ways by which Jesuits have reached out and assisted underserved youth by providing affordable quality Catholic education. Today, two of the most familiar models outside the Philippines are

the Cristo Rey Schools and the *Fe Y Alegria* Network of Schools. The Cristo Rey Network of Schools in the US provide access to quality secondary education for students who come from low-income families through its unique work-study program (Aldana, 2015; Kabadi, 2015). The *Fe Y Alegria* Network of Schools (FYA), on the other hand, began its operations in Venezuela in 1955 as a private, Jesuit supported initiative of an integrated popular education movement that attempted to respond to an urgent need to provide educational opportunities to disadvantaged students from suburban and rural areas in more than 15 countries, mostly in Latin America (Latorre & Swope, 1999; Osorio & Wodon, 2014).

**Mission high schools.** In the Philippines, one of the most significant ways that Jesuits have served the underprivileged youth has been through the mission high schools. Not much has been written about the Jesuit mission high schools despite their apostolic value and long-standing presence in the country (Meany, 1956). They are only a small segment of the educational ministry of the Jesuits and the Catholic Church in the Philippines (Jesuit Philippine Province, 2017).

***Education for those in the Philippine peripheries.*** Access to primary education has been a challenge to the poorest sectors of the Philippines. As indicated in the survey data of the Philippine government on the country's poverty indicators (Philippine Statistics Authority, 2016), there were more than 12 million youths in schooling ages six to 24 years old who were not attending school in the academic year 2016-2017 for various reasons. Out of this number, 4,923,000 came from the bottom 30% of the income stratum of the country (Philippine Statistics Authority, 2016).

Moreover, the youth in the southern region of the nation, where most of the poorest rural provinces in the country are located, have remained to be educationally disadvantaged through the years (Philippine Statistics Authority, 2017). In a statistical study that compared the educational attainments of Filipino students from the urban and rural schools, Zamora and Dorado (2015) showed that rural educational attainment lagged behind urban areas. The study also indicated that rural-urban educational attainment gaps were more manifest in the Southern Philippines when compared to other areas in the country (Zamora & Dorado, 2015).

These numbers came at a time when the country was also adjusting to the modification of its national basic education system through the *Enhanced Basic Education Act* of 2013 (Okabe, 2013). This law has extended the Philippine high school program with two additional years (Okabe, 2013). It has an impressive goal of developing 21st century skills among Filipino youth in order to promote their holistic growth and prepare them better for higher education, entrepreneurship, or employment (Okabe, 2013). An even more lofty goal for rural high schools, such as those on the Southern Philippines, has been to educate the youth in their local villages so that they can find or create meaningful opportunities where they are and will no longer have to migrate to over-populated urban centers for employment (Geronimo, 2017).

***Government support for primary education.*** Consequently, the national Department of Education (DepEd) has tried to raise the education budget, reform the curriculum, train teachers, and build classrooms in the public schools from 2013 to 2016, leading up to the Duterte administration (Geronimo, 2017). The government has also partially subsidized schooling of indigent students through scholarships and voucher programs, especially in places where access to public high schools has been inadequate (Geronimo, 2017). These public-funded

appropriations have allowed eligible beneficiaries to claim a deduction from the cost of tuition and other fees charged by an accredited non-public high school, such as parochial mission schools sponsored by faith-based institutions (Uy, 2017).

***Private-sectarians in Philippine education.*** Realizing the value of offering quality education for the country's youth, the Catholic Church has tried to assist the Philippine government in providing schooling to the rest of the young Filipinos who either prefer private and religious education or those who simply have no access to any public schools in their locality (Palma, 2012). In 2012, the Catholic Educational Association of the Philippines (CEAP) listed about 1,300 member schools, and some 900 of these are small, mission schools spread across the country (Palma, 2012). However, many of these mission schools, which are sponsored by religious orders or Catholic dioceses, also struggle to provide quality education to students because of the meager resources available to them (Palma, 2012).

When compared to the more established Catholic schools in the urban centers, rural mission schools can be far behind in terms of promoting students' educational success due to their limited teaching and support personnel, poor working and learning conditions, deficient governance, and weak operational viability (Starr & White, 2008).

A number of these types of schools are found in Mindanao where the Philippine Jesuits have established and sponsored mission high schools in some of its poorest and most remote villages (Jesuit Philippine Province, 2016a, 2016d; see A for a map of the Southern Philippine Mission District). What has made this geographic area particularly complicated is how the socio-political and economic situations in the locality have severely affected the students' learning

especially for those coming from impoverished indigenous communities (Jesuit Philippine Province, 2016a, 2016c; Rodil, 1990).

### **A New Roadmap to Mindanao: Jesuits in and for the Margins**

For the Jesuits, the ministry of leading schools for the underserved students in the Southern Philippines means dedicating capital and resources, particularly capable priest-educational leaders, to run these institutions (Jesuit Philippine Province, 2016d). This commitment has become incredibly pertinent with the rediscovery of the importance of the mission to the marginalized in Mindanao after the visit of Pope Francis to the Philippines in 2015 when he explicitly reminded the Filipino Jesuits to go to the fringes of society (Jesuit Philippine Province, 2016d). The Jesuit Pontiff, according to the account of Fr. Mark Raper, S.J. (2015) a former president of the Jesuit Conference of Asia Pacific (JCAP), expressed much concern over the plight of those who were silently suffering in the margins, reiterating that the Jesuit mission must seek to “go to the peripheries, to accompany people who live on the edges” (p. 1).

**Jesuit school governance.** In schools where the students’ holistic growth is a paramount mission of the learning community, well-trained educational leaders are necessary (Leithwood, Day, Sammons, Harris, & Hopkins, 2006; Leithwood, Louis, Anderson, & Wahlstrom, 2004). Studies have shown that school governance have a significant effect on the quality of the learning of students and the performance of the school as a professional organization that advocate for the success of all its students (Hoppey & McLeskey, 2013; Leithwood, Harris, & Hopkins, 2008; Leithwood & Riehl, 2003).

Those Jesuits who will be assigned in the margins, especially as leaders in the schools for the disadvantaged, must learn to work with other professionals and institutions to adapt to the

multifaceted and overlapping landscape of Philippine education and the Jesuit mission. They will need to be apostolic school leaders who could skillfully assert the dimension of faith that promoted justice in the education apostolate and insist on the need for creative collaboration with individuals, professionals, and local communities (Nebres, 1981) to foster inclusive learning for all students.

**The question of preparation.** Leadership ideals and competencies are expected of all Catholic school leaders, including clergymen, who are appointed as pastors and administrators of these schools (Boyle et al., 2016; O’Connell, 2007). Disregarding the need for transformative leaders in these schools renders the whole enterprise of establishing and maintaining Catholic mission schools for the underserved youth as irrelevant (Jesuit Philippine Province, 2016d) and almost farcical (Arrupe, 1999; Nebres, 1981).

The question then is: How are Filipino Jesuits prepared for such an important leadership role in the complex setting of the mission schools in the Philippines?

### **Preparing Men for the Priesthood**

In this second major section of the chapter, I will discuss the development and the general principles of the Catholic seminary formation. I will then illustrate how these have been appropriated in the Jesuit scholastic formation with the Ignatian ideal of preparing men who are God’s faithful servants, responsive to the cries of a world in need of justice.

### **The Seminary**

It was after the promulgation of the documents of the 16th century Council of Trent that the modern institution of the Catholic seminary came to its recognizable form today (Oakley, 2017). The term itself, having been derived from the Latin word *seminarium* or “seed plot”

signified a kind of nursery to plant, protect, and nurture the vocation of young men for the priesthood (Oakley, 2017). The Council originally structured it as a self-sufficient environment where seminarians preparing for priestly ordination learned and lived alongside their formators or those responsible for their spiritual education (Oakley, 2017). This system seemed like an offshoot of the ancient practice of *domus episcopi* where venerable bishops of the Church like Augustine of Hippo or Isidore of Seville founded small communities of men to undergo moral formation and practical training under their tutelage (Bellitto, 2005).

Indeed, the core of this practice dates back to the time of Jesus, who prepared other men to follow his path of proclaiming the Good News to all. The rector and president of Notre Dame Seminary in New Orleans, Fr. James A. Wehner (2012) wrote about the Catholic seminary as a place where men who are training to be priests gather around the Lord to listen and learn as his first apostles did almost 2,000 years ago. As such, any Catholic seminary in its essence remains to be a community with an inherently apostolic character. It tries to adhere to an identity that is similar to the community of the first apostles—rooted in being called by the Lord and sent forth to proclaim the Good News (Wehner, 2012). Seminary formation then, whether it be for the different local dioceses or religious orders such as the Jesuits, has taken its universal, though not necessarily uniform structure across countries and has become essential in the preparation of the Catholic clergy through the years (Confoy, 2008).

### **Modern-day Seminary Formation: Reforms from Vatican II to 2016**

Three centuries after the Council of Trent, the seminary formation in the Catholic Church underwent profound changes through the Second Vatican Council or Vatican II (Oakley, 2017). One of the key documents that came out of this contemporary council was the decree on

priesthood: *Presbyterorum Ordinis* (Confoy, 2008). The Church's theological renewal of her self-understanding through Vatican II necessarily led to a renewal of her "understanding of priesthood and how men should be formed for this ministry" (Oakley, 2017, p. 225). Rather than merely focusing on the personal development of virtues or spiritual counsels that would lead a seminarian to a holy life, there was a notable emphasis, too, on the value of preparing him for fruitful priestly ministry (Confoy, 2008; Oakley, 2017; Second Vatican Council, 1996b).

The principles that supported such a preparation program were elaborated further in Vatican II's Decree on the Training of Priests known as *Optatam Totius* (Confoy, 2008; Oakley, 2017; Second Vatican Council, 1996a). This Church pronouncement affirmed the wisdom of tradition in preparing men for the priesthood but acknowledged that with the changing landscape in the modern times, there was also an urgent need to do things differently (Oakley, 2017).

Without reducing the formation of seminarians to something that was purely pragmatic and ideological lest it leaned too much on secular standards, the Church council acknowledged the necessity, nonetheless to adapt the formation of seminarians to the various social contexts of the local Churches across the globe (Oakley, 2017; Second Vatican Council, 1996a). To a certain extent, the curriculum of studies has persisted in its familiar format in terms of spiritual, philosophical, and theological grounding, but now informed by a rigorous pedagogy and robust psychology (Oakley, 2017; Second Vatican Council, 1996a). Moreover, this decree expressed hope that through the seminary formation, a seminarian might acquire the strength of character and virtues, such as a constant concern for justice, that is esteemed by today's people (Second Vatican Council, 1996a).



**Forming good shepherds.** Yearning to improve seminary formation in relation to a greater sense of relevance to the demands of a new kind of evangelization in the contemporary world, Pope St. John Paul II (1992) in *Pastores Dabo Vobis* (I will Give You Shepherds), further reflected on how to promote and sustain vocations as well as form seminarians while giving special attention to the challenging contexts of a Church entering the new millennium (Wehner, 2012). As the title suggests, St. John Paul II's (1992) apostolic exhortation centered on an image of how he saw a priest ought to be—a pastor in the likeness of Christ, the Good Shepherd who came not just to care for his flock but to seek the lost sheep (Oakley, 2017).

In the fifth chapter of *Pastores Dabo Vobis*, St. John Paul II (1992) presented an interrelated framework that cultivated the areas of priestly preparation for seminarians for the work of New Evangelization: (a) human, (b) intellectual, (c) spiritual, and (d) pastoral (Oakley, 2017). These areas of formation are not mutually exclusive of each other. They are linked together and moved the seminary formation towards its spiritual and apostolic goal of preparing men for their priestly ministry (Oakley, 2017).

**The gift of priestly vocation.** The exhortation of St. John Paul II (1992) has influenced the ever-deepening reflection of seminary formators on how best to prepare seminarians for the priesthood. It has also led to modifications in the seminary programs in later years (Oakley, 2017). The most recent universal Church document that takes its cue from *Pastores Dabo Vobis* is the new *Ratio Fundamentalis Institutionis Sacerdotalis* (Congregation for the Clergy, 2016). The Gift of Priestly Vocation (Congregation for the Clergy, 2016) as it is translated in English, has further refined what is expected in the formation of seminarians seeking ordained ministry (Oakley, 2017).

The Congregation for the Clergy (2016) presented the formation program within the four formation dimensions of *Pastores Dabo Vobis* (John Paul II, 1992) as a continuous course from an individual's discernment of his vocation, through his seminary years, all the way to his ongoing formation in every phase of his priestly life (Oakley, 2017). In the spirit of Pope Francis' dynamism, the Congregation emphasized further that the seminary curriculum must lead a seminarian to go beyond an intellectual assent to the Church's teachings but must truly develop in him an experiential knowledge in his heart of the life of Christ—the God Incarnate (Oakley, 2017).

***Shepherds smelling like their sheep.*** This renewed perspective reflected a profound understanding of vocation as a personal encounter with the merciful God who has called the seminarian, with his strengths and weaknesses, to the priesthood in the service of the Church (Oakley, 2017). It was through this hermeneutical lens that the new Ratio spoke of the seminarian as a “mystery to himself . . . characterized by talents and gifts that have been molded by grace, [yet] marked by [his] limits and frailty” (Congregation for the Clergy, 2016, p. 28).

In the words of the Congregation for the Clergy (2016):

The seminarian is called to “go out of himself” to make his way, in Christ, towards the Father and towards others, embracing the call to priesthood, dedicating himself to work with the Holy Spirit, to achieve a serene and creative interior synthesis between strength and weakness. The educational endeavor helps seminarians to bring all aspects of their personality to Christ, in this way making them consciously free for God and for others. (p. 17)

This radical movement of abandoning one's self to be with God for the service of others is at the heart of Pope Francis' challenge to priests around the world (Glatz, 2013). It is to bring the reconciling power of God's salvific mercy to all and be in great solidarity with those at the margins; thus becoming “shepherds living with the smell of the sheep” (Lennan, 2016, p. 453).

## **Forming Future Jesuit Priests**

This perspective that Pope Francis has offered is not entirely new. Indeed, St. Ignatius saw the formation of young Jesuits as radically apostolic in orientation because it is geared towards a deepening of the life of Christ in them in order for them to serve Christ's people effectively in the world (Ganss, 1970).

**Spiritual Exercises.** The basis of this fundamental apostolic orientation among Jesuits is St. Ignatius's Spiritual Exercises, a manuscript of the Founder's life-changing spiritual awakening that has evolved into a series of meditations and contemplations mainly on the life of Christ (Schineller, n.d.). Each Jesuit prayerfully undergoes the Spiritual Exercises for a month in a silent retreat, first as a novice, then after several years of ordained ministry, as a tertian (Jesuit Philippine Province, 2005; Kolvenbach, 2003; O'Malley, 1993). It is a central element in the early formation of a Jesuit scholastic, and it shall be his spiritual touchstone experience that will profoundly influence the rest of his Jesuit vocation (Kolvenbach, 2003).

**The purpose of Jesuit formation.** With the spiritual foundation firmly put in place, St. Ignatius was then very particular in the kind of step-by-step formation that the Jesuit formands ought to receive in *enfleshing* this spirituality (Society of Jesus, 1996). He stipulated in the Congregation's constitutions, years before the Council of Trent, that the two-pronged aim of the Jesuit formation program is "to help the souls of its own members and those of their neighbors" (Ganss, 1970, p. 187). St. Ignatius then emphasized that it is by this "norm that the decision will be made, both in general and in the case of individual persons, as to what subjects ours (Jesuit

formands<sup>3</sup>) ought to learn and how far they ought to advance in them” (Ganss, 1970, p. 187). The purpose of seminary formation for St. Ignatius can be summed up as a holistic and integrative formation that is “humanistic, philosophical, and theological” and aimed at forming a “priest apostle” (de Aldama, 1989, p. 164).

**Aspects of Jesuit formation.** Ignatian spirituality scholar, Fr. Howard Gray, S.J. (2008), further identified three crucial aspects of the Jesuit formation in the mind of St. Ignatius: (a) how to become a contemplative-in-action, (b) the environment that promotes formation within the religious order, and (c) the ways the Jesuit formand is assessed.

**Contemplative-in-action.** Jesuit archivist and America magazine contributor Peter Schineller (n.d.) succinctly described the Jesuit trait of being a “contemplative-in-action” as an integral combination of living a reflective and active life that allows a Jesuit to seek, find, and serve God in all things. In other words, it is the sensibility that leads a Jesuit to discover God’s presence in one another and the world (Gray, 2008). For St. Ignatius, this was a kind of interiority that did not isolate the young Jesuit formand from the world nor directed his attention solely to himself, but instead, thoughtfully looked outward to others and engaged God in the world (Gray, 2008).

This inclination towards and sensitivity to God’s abiding presence in the world also found its genesis in the Spiritual Exercises of St. Ignatius and has been crucial to a Jesuit’s formation not just in the early years of his training but throughout his religious life (Gray, 2008; Jesuit Conference of Asia Pacific, 2011). This principle of “finding God in all things” has

<sup>3</sup> This privileging of rigorous academic formation may have also been the reason why the preferred name for a Jesuit formand intending to be a priest is the more dynamic term “scholastic”—as someone who is actively engaged in scholasticism, rather than “seminarian” which may conjure an image of a seed that is passively growing in isolation (Cross & Livingston, 2005).

defined his formation, to be sure, his very *being* as a Jesuit formand—immersed in his studies, engaged in his relationships and interactions within and beyond his immediate religious community, and invested in his encounters of different cultures and faith traditions (Gray, 2008). Howard Gray, S.J., (2008) rightly emphasized that the effect of this Ignatian formation directive has been far-reaching because “what this education in attention, reverence, and devotion invites is an apostolic consciousness, a readiness to expect God to communicate his presence and intentionality within all created reality but especially within human relationships” (p. 72). For a Jesuit preparing for priesthood then, following Christ to his Kingdom cannot be separated from accompanying others in the “clutter” of this world (Jesuit Conference of Asia Pacific, 2011).

***Formation environment.*** The manner and environment by which a young Jesuit scholastic is inducted into this practical spirituality of finding God in all things is quite clear in the mind of St. Ignatius as well. It is seen in the third part of the Jesuit Constitutions where St. Ignatius described the formation environment in which awareness and devotion to God in others can be best demonstrated and learned (Gray, 2008). St. Ignatius thus wrote in the Constitutions (Society of Jesus, 1996):

It will be beneficial to have a faithful and competent person whose function is to instruct and teach the novices in regard to their interior and exterior conduct, to encourage them toward this correct deportment, to remind them of it, and to give them kindly admonition; a person whom all those who are in probation may love and to whom they may have recourse in their temptations and open themselves with confidence, hoping to receive from him in our Lord counsel and aid in everything. (pp. 118-119)

***The value of edification.*** A key insight that St. Ignatius had shared in this statute is the value of edification which is integral in forming young scholastics to be contemplatives-in-action. The scholasticate or the seminary community, particularly the formators, must be exemplary guides in inspiring virtuous and apostolic lives among the scholastics. They (i.e.,

novice master, rector, delegate for formation, and prefect of studies) must also act as trusted mentors to the formands by carefully guiding them to a reflective sense of spiritual freedom, intellectual depth, and compassionate ministry (Gray, 2008; Society of Jesus, 1975).

*Staying focused.* St. Ignatius, in the sixth chapter of Part III of the Constitutions, specified the “means by which the scholastics will progress toward learning [their subjects/courses] well” (Society of Jesus, 1996, p. 159). The first, a familiar iteration from St. Ignatius in terms of the dual end goals of formation, was to remain focused and dedicated to their studies as they kept their intentions pure: that of glorifying God and preparing oneself to be of service to others (de Aldama, 1989; Society of Jesus, 1996). From this central reminder came the other gentle admonitions for the scholastics to heed in order to fulfill what was demanded of them in their studies, such as shunning excessive devotions and mortifications,<sup>4</sup> “burdensome” household tasks, and even unnecessary spiritual ministries to others<sup>5</sup> (de Aldama, 1989; Society of Jesus, 1996).

*Learning through constant practice.* St. Ignatius proposed a manner of learning that is similar to his (and his first companions’) experience at the University of Paris. It was attaining proficiency through the persistent cyclical practice of reflection and action (de Aldama, 1989). Jesuit Constitution expert Fr. Antonio M. de Aldama, S.J., (1989) listed these exercises that formands traditionally performed after listening to a lecture from a professor to improve their academic competence: “There are the repetitions, disputations, compositions in prose or in verse, speaking in Latin and orations” (p. 172).

<sup>4</sup> Ignatius was prone to scrupulosity and excessive spiritual fervor which he discovered were possible hindrances in studies (de Aldama, 1989).

<sup>5</sup> Ignatius felt that there was a more appropriate time for this sense of apostolicity. When one has finished his studies, the better equipped he is to serve others (de Aldama, 1989).

Other formation exercises were not just limited to improving academic proficiency. Part IV of the Jesuit Constitutions has specified what St. Ignatius saw as the kind of needed “instruction of those who were retained in the Society, in learning and in other means of helping their fellowmen” (Society of Jesus, 1996, p. 131). This section of the Jesuit Constitutions has enumerated the various ways in which scholastics were instructed in pastoral skills such as presiding at the Eucharist, hearing confessions, and preaching the Word of God (Society of Jesus, 1996). Again, the value of this pastoral formation has been inferred from the primary purpose of formation and training in the Society— “to instruct and form ministers . . . to aid our fellow men [*sic*]” (de Aldama, 1989, p. 174). Going through these practical pastoral exercises as formands would prepare them well for their future ordained ministries (de Aldama, 1989).

*Experiments.* In addition to these, there have been specific exercises, or “experiments,” as Ignatius called them in the Constitutions, which are designed specifically into the early and later stages of the formation program, such as the novitiate and tertianship (Society of Jesus, 1996). These experiments are not just meant to “test” one’s vocation to the Society but to move the formands to a profound appreciation of the inherent apostolic nature of the order—that indeed Jesuits are capable and nimble enough to labor with God *in* this world (Gray, 2008).

Preparing men for Jesuit apostolic life often meant exposing them to realities that challenged their resiliency and fidelity to Ignatian principles, which may no longer be as safeguarded and supported by structures once they have moved out of the seminary formation (Gray, 2008). Thus, Ignatius required all Jesuit formands to go through such kinds of experiments, most especially during their first two years of formation in the novitiate (Gray, 2008; Society of Jesus, 1996). Undoubtedly, these experiments also allowed the formands to

value even more deeply the apostolic character of the Society of Jesus—how Ignatius envisioned it to be a group of dedicated men, “able to work on the frontiers of the Church and even in lands and in enterprises that were not part of Christendom much less Catholicism” (Gray, 2008, p. 73). In other words, these experiments as part of a “schooling for service” are intended to assess and strengthen the ability of the Jesuit formands to espouse a manner of Christian commitment that was beneficial both to themselves and others (Gray, 2008).

*Immersed in the world.* In addition to this, an essential component of the Jesuit formation pedagogy is the immersion of the formands in the context where they will be missioned in the future as ordained ministers (or formed brothers) (Society of Jesus, 1975). The formation program in the Society of Jesus must be relevant and responsive to the demands of evangelization in a world that is wounded by injustices of every kind (Society of Jesus, 1975, p. 5). The integration of studies and apostolic life in Jesuit formation has been of utmost importance as the 32nd General Congregation<sup>6,7</sup> of the Society of Jesus decreed:

Since our mission today is the proclamation of our faith in Jesus Christ, which itself involves the promotion of justice, our studies must be directed toward this mission and derive their motivation from it. In a world where faith is fostered only with great difficulty and in which justice is so broadly violated, our wish is to help others arrive at a knowledge and love of God and a truly fraternal love of men [*sic*], to help them lead lives according to the Good News of Christ and to renew the structures of human society in justice. (Society of Jesus, 1975, decree 6, para. 21)

<sup>6</sup> A General Congregation is the Society of Jesus’ highest governing and legislative body. It is only convened either to elect the Superior General and for extraordinary ecclesiastical or Jesuit concerns (Schineller, n.d.).

<sup>7</sup> The 32nd General Congregation was held at the Jesuit Curia in Rome in 1975. It issued several important decrees, including the decree on “Our Mission Today: The Service of faith and the Promotion of Justice. (Decree #4)” (Schineller, n.d.).



The manner of formation then in the Jesuit order has been an experiential and reflective pedagogy that can integrate “the way a man prays and orients his life and the kind of ministerial presence he brings to his work with other people” (Gray, 2008, p. 74).

*Avoiding clericalism.* It is important to emphasize, however, that this manner of formation do not intend to elevate a Jesuit to a kind of separate class within the Church or the general population where he may automatically be placed in a privileged position of leadership vis-à-vis the laity (Fischer, 2010). Jesuit author, Fr. George B. Wilson (2008) argued in his book, *Clericalism: The Death of Priesthood*, that once a seminarian is ordained and uncritically takes-in the “perks” of clerical hierarchy, he may begin to embody a kind of being that sets him apart from the “un-ordained.” This privileged stance is all the more emphasized as he realizes that by his priestly ordination, he now has unique access to powers not available to the laity, and his clerical garb, language, and title further affirm this embodiment of authority (Wilson, 2008).

Moreover, some seem to get fixated with a false and outdated notion of ordained priesthood as a privileged rank in the social order, unmindful of how the Catholic Church is no longer the expansive and dominant institution that she once was and how the Church now has to humbly learn to navigate through complex and pluralistic settings in order for her to be relevant and effective in her mission (Deck, 2010). The rector of the Jesuit community in Loyola Marymount University and distinguished scholar in pastoral theology, Fr. Allan Deck, S.J. (2010) wrote: “Today’s seminarians and priests . . . need a certain grittiness that will serve them well in the face of new pastoral realities” (p. 37). Thus, the brand of a priesthood that isolates one’s self from people because of narcissism and self-aggrandizement is not what ordained

ministry is about. It must, therefore, be assessed, checked, and corrected in a seminarian before he receives the Sacrament of Holy Orders (Fischer, 2010).

*Assessment of formands.* Ultimately, a Jesuit formand's growth and readiness towards priesthood is seen in how he can integrate all the dimensions of formation (i.e., spiritual, intellectual, and affective) towards the goal of being a humble servant of the people of God and an effective bearer of the Good News to this world as Christ was (Society of Jesus, 1966, 1975).

Rightful assessment of formands is not limited to comprehensive academic examinations that are usually administered through either oral or written exams (Society of Jesus, 1975). Based on the scholastic's holistic integration of the different formation aspects, a Jesuit formand, before he is finally approved for priestly ordination, is anonymously evaluated by his superiors, peers, and lay colleagues through the process of *informationes*, or scrutiny (Schineller, n.d.; U.S. Jesuit Task Force on Formation and Leadership, 2009). As recommended by the U.S. Jesuit Task Force on Formation and Leadership (2009), however, it is crucial that in this process, certain structures are put in place to specifically assess the scholastic's readiness as well for leadership and governance and to provide him with helpful feedback on his areas of growth.

### **Forming Future Priests in the Philippines**

The formation of the clergy, though necessarily adhering to the standards and procedures of the Universal Church (and the Society of Jesus) must find its practical expression in the context and circumstances that are cognizant and responsive to the needs of the local Church (Episcopal Commission on Seminaries, 2005). Filipino moral theologian and priest, Fr. Rodel Aligan (2015), writing about the Asian context of priestly formation, affirmed the need and

urgency of preparing future priests who are critically aware of the various issues that confront the Church.

**Critically aware.** Aligan (2015), thus, echoed the concern of the Federation of Asian Bishops' Conferences (FABC), which, in its Fifth Plenary Assembly in Bandung, Indonesia, in 1990, emphasized the necessity to train seminarians on how to address complex challenges affecting them and their future flock. Some of the critical issues that the Church in Asia faces are the threat of ecological destruction, poverty, consumerism, and secularism (Aligan, 2015). Not to be forgotten, too, is the need to adapt the formation program for it to be truly in touch with the diverse cultural environments where the future priests are called to minister (Deck, 2010).

**Engaged.** To be sure, future ordained ministers cannot remain unaffected and neutral in the face of the social inequities that plague their local communities (Aligan, 2015; Episcopal Commission on Seminaries, 2005). It is a call to be truly evangelical and missionary-disciples who are not fixated on the romantic notion of sacerdotal ministry but are ready and able to take the arduous and winding journey with others, especially with the poor and the excluded in today's world (Deck, 2018).

Aligan (2015) reiterated, however, the reminder of the FABC bishops that seminarians and priests, though impassioned with a greater awareness of the injustices that they need to oppose, must make sure that they do not slip into a manner of activism that is purely ideological. Fostering the overall Christian growth of their community should remain to be the spiritual motivation of the clergy's participation in addressing the social issues facing the people, and this motivation can then be lived out in their contexts through various specific and concrete ways (Aligan, 2015; Episcopal Commission on Seminaries, 2005).

In the Philippine setting, for instance, a priest must not simply be a spiritual leader engaged in gathering a community of parishioners for sacramental worship, he must exercise his priestly vocation by introducing “community projects (i.e., healthcare and education) in a particular locality or parish; championing the cause of human rights especially in far-flung communities . . . ” (Aligan, 2015, p. 185) from the perspective of Catholic social teachings.

**On a mission.** It has become apparent that the kind of priest needed in the Philippines is not a unidimensional spiritual guru who remains insulated from his broken and suffering environment (Aligan, 2015; Episcopal Commission on Seminaries, 2005). He is not a hermit but a missionary at heart, and so this missionary spirit must be clearly articulated in his formation that leads to ordained ministry. Indeed, this is the hope for a Filipino Jesuit formand aspiring for the priesthood:

The Jesuit in formation finds himself at the center of a number of interrelated dynamics all of which, if he is open to the process, have the potential to form him as a contemplative-in-action. (Jesuit Conference of Asia Pacific, 2011, p. 3)

**The interrelated dynamics of Jesuit formation.** The latest attempt to lay out these principles in the particular context of the Asia Pacific region is found in a 2011 Jesuit Conference of Asia Pacific (JCAP) document entitled *Forming a Contemplative-in-Action: A Profile of a Formed Jesuit for Asia Pacific* (Jesuit Conference of Asia Pacific, 2011). This document (henceforth referred in this study as the “JCAP document”), written by Jesuit formators coming from the Philippines, Indonesia, South Korea, and Australia, has rearticulated not just St. Ignatius’ aspirational policy on the formation of Jesuits, but also attempted to enumerate some specific guidelines that directed both the scholastics and their formators in

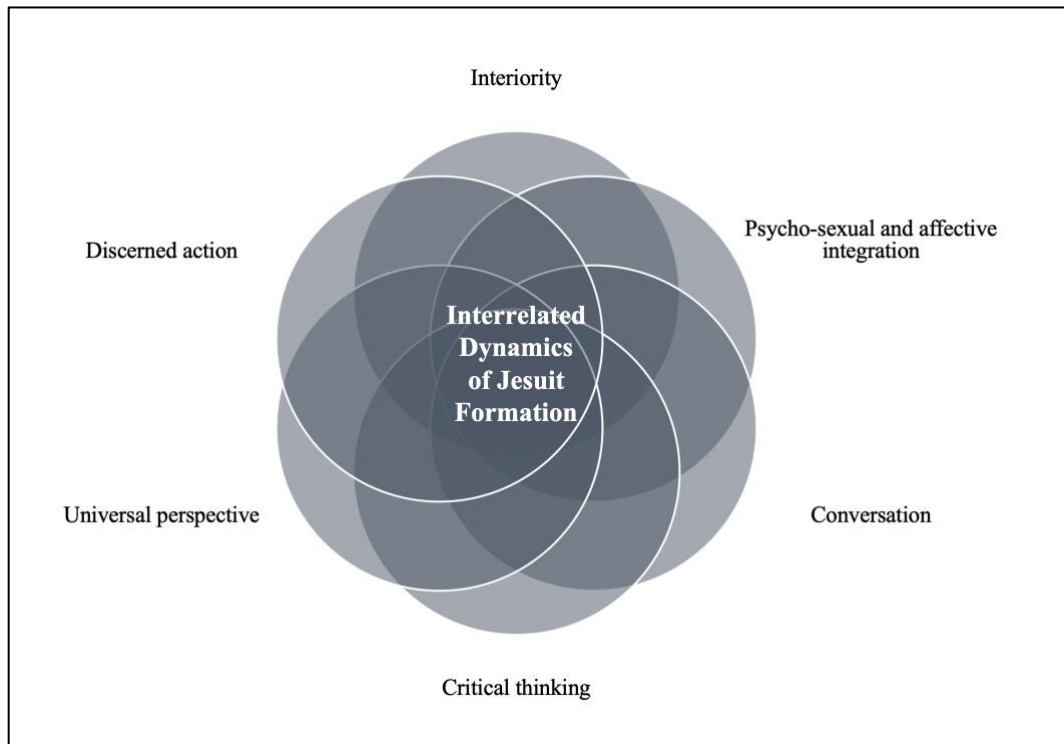
attaining competencies that a “formed Jesuit for the Asia Pacific needs to have mastered” (Jesuit Conference of Asia Pacific, 2011, p. 1).

***The generalist formation.*** The Jesuit leadership in the Asia Pacific upheld that once an individual has been carefully recruited and chosen to join the religious order as a formand, he will be guided by formators and expected to gradually grow in general competencies that take on the aspects of “virtues (e.g., generosity), dispositions (e.g., openness), skills (e.g., leading a prayer), and knowledge (e.g., strategic, procedural or factual forms of knowledge)” (Jesuit Conference of Asia Pacific, 2011, p. 7).

Such growth ought to become more evident as the Jesuit formand goes through the basic seminary formation (i.e., novitiate, first studies, regency, and theological studies) that leads him to priestly ordination or as a professed religious brother for those not intending to become ordained ministers (Jesuit Philippine Province, 2005). Ordination, technically, does not end a Jesuit’s formation period. After a few years of active ministry, he then proceeds to tertianship (Jesuit Philippine Province, 2005). It is the final stage of Jesuit formation that synthesizes his formative experiences to prepare him for his full incorporation to the Society of Jesus by his profession of perpetual solemn vows of poverty, chastity, obedience, and possibly a fourth vow, peculiar to the Jesuits: a special obedience to the Holy Father in matters regarding mission (Jesuit Philippine Province, 2005; Kolvenbach, 2003).

***The six dynamics of forming a Jesuit.*** The JCAP document (2011) thus listed six sets of interrelated dynamics of a formed Jesuit who ought to be a “contemplative-in-action,” or a Jesuit who has frequent “recourse to discerned action by realizing a circular movement passing from prayer to action and from action back to prayer” (Coghlan, 2005, p. 95).

These six dynamics in the general formation of a Jesuit, as illustrated in Figure 3 are (a) interiority, (b) psycho-sexual and affective integration, (c) conversation, (d) critical thinking, (e) universal perspective, and (f) discerned action (Jesuit Conference of Asia Pacific, 2011).



*Figure 3.* The six inter-related dynamics of Jesuit formation. From “Forming a Contemplative-in-Action,” by Jesuit Conference of Asia Pacific, 2011. Copyright 2011 by Jesuit Conference of Asia Pacific. Reprinted with permission.

Interiority is described as spiritual depth (Nicolás, 2008). Psycho-sexual and affective integration is the coming into maturity in the areas of affectivity, sexuality, and psyche, which can be characterized by emotional stability, general sociability, as well as an appreciation of a celibate life (Jesuit Conference of Asia Pacific, 2011). Conversation is the disposition of openness for dialogue and transparency before others whether it is between him and his fellow Jesuits (e.g., with superiors) or his lay companions in ministry and work (Jesuit Conference of Asia Pacific, 2011). One of the most crucial aspects of this dimension is the capacity of a Jesuit to engage in a sincere “manifestation of conscience” with his provincial superior (Jesuit

Conference of Asia Pacific, 2011). A Jesuit's account of conscience with his appointing superior provides essential information for Jesuit leadership in determining where a particular Jesuit could be assigned to meet any specific apostolic needs of the Society of Jesus (Jesuit Conference of Asia Pacific, 2011).

Critical thinking is the Jesuit's capacity brought about by serious academic studies (i.e., communications, philosophy, theology, etc.) that enable him to "analyze socio-political contexts, reflect on experience, understand enculturation, identify and challenge assumptions, and so on" (Jesuit Conference of Asia Pacific, 2011, p. 5). Universal perspective is the Jesuit's profound appreciation of the global nature of the order; that it is, "a universal body with a universal mission" (Society of Jesus, 2008, decree 2, para. 20). Finally, discerned action is the capacity to engage in the cycle of action-reflection-action in his day to day living (Jesuit Conference of Asia Pacific, 2011).

***The specific training prior to missioning.*** Crucial to the apostolic training of Jesuits are the attainment of "breadth and excellence in learning which are required for our vocation to achieve its end" (Society of Jesus, 1966, decree 9, para. 13). Such span and depth of learning may require of a Jesuit formand to engage in specialized studies even before he is ordained a priest (Society of Jesus, 1966).

In the revised formation guidelines for Filipino Jesuits that took its cue from the JCAP formation policy document (2011), the last four or so years spent in theological studies ought to play a crucial role in a Filipino Jesuit's training for specific competencies in his immediate assignments and long-term ministerial priesthood (Jesuit Philippine Province, 2015b). In this updated document, the last year of theological studies for a scholastic is not just a year of

synthesis. When compared to the early years of formation, it is a period characterized by greater flexibility that is geared towards the formand's orientation for future work (Jesuit Philippine Province, 2015b).

Consequently, this formation period which is the final academic years before one is ordained a priest, ought to provide diverse pastoral opportunities through class “electives and practicum courses for those who will concentrate on fields other than theology” (Jesuit Philippine Province, 2015b, p. 4). Theoretically speaking, this is also the period in which the Jesuit scholastic is aided to integrate all of his studies to his future mission by way of undergoing training that involves “concrete professional, pastoral skills for the various pastoral ministries” (Jesuit Philippine Province, 2015b, p. 10).

As such, fostering an integrative formation that is distinctively focused on the apostolic mission of the soon-to-be-ordained scholastic cannot be overemphasized (Jesuit Philippine Province, 2015b). The final period of scholastic training for a Jesuit must be pastoral and individualized, considering largely, the personal abilities and gifts of the scholastic as well as the specific needs of the mission to which he will be sent as an ordained minister (Jesuit Philippine Province, 2015b; Society of Jesus, 1966, 1975).

**From paper to practice.** Making a leap from policy to practical application is a tough challenge in seminary formation (Oakley, 2017). Indeed, even if the formation policy is clear in its intent to form priests who are sufficiently equipped to lead in the ministries to which he would be assigned, the actual seminary curriculum might not yet support this goal intentionally and programmatically (Boyle & Dosen, 2017; Okochi, 2009).



Certainly, transformative educational leadership skills do not come as inherent and automatic traits for priests upon ordination. Acute preparation, according to the study of Okochi (2009), is essential. One of the participants in his study admitted that even though the seminary formation had helped him manage his parish, it had fallen short in helping him manage their parochial school (Okochi, 2009). In fact, several participants in his study conducted in the Catholic diocese of Awka in Nigeria expressed a kind of regret for not receiving enough training on educational leadership in their seminaries prior to their priestly ordination (Okochi, 2009).

### **The Educational Leadership Leap for the Clergy**

Much has changed in the educational landscape and the expectations placed on school leaders through the years (Kemp-Graham, 2015; Leithwood & Riehl, 2003). In Catholic educational institutions where priests take on active administrative roles, the responsibilities of the clergymen have become complicated, and yet, the seminary curriculum and programs continue to prepare seminarians mostly for traditional pastoral roles only (Boyle & Dosen, 2017; Boyle et al., 2016; King, 1990; Schafer, 2004). Such a gap in the preparation programs (Boyle & Dosen, 2017) can lead to a void of skilled educational leaders for 21st century schools that are inclusive and responsive to the multifaceted needs of students, especially those in the margins (Jean-Marie et al., 2009; Kemp-Graham, 2015; Preston, Jakubiec, & Kooymans, 2013).

The demands in the Jesuit education apostolate, especially those in the far-flung rural missions, have also evolved, and yet the training that some Jesuits receive has remained mostly the same in practice (U.S. Jesuit Task Force on Formation and Leadership, 2009). Given that the Jesuit schools have a mission to provide excellent quality Catholic schooling that educates the whole person and has a positive impact on the student's community, it is reasonable to expect the

same high standards of excellence in Ignatian leadership (O’Connell, 2007). If their students and graduates are expected to be servant-leaders ready to change the world for the better, then this standard must also hold for the members of these schools’ administration, faculty, and staff—not the least, the Jesuits among them (O’Connell, 2007). In relation then to the ministries of the Jesuits, particularly their effort in providing secondary education to those in the margins of society in the Philippines, it is valid to ask if they have indeed received sufficient preparation to lead their institutions in the way that makes them leaders and effective agents of social change.

### **Educational Leadership for Social Justice**

I shall now present, in this third major section, studies that have highlighted a kind of responsive school leadership that is needed in running mission-driven schools. School leadership is one of the fundamental factors in establishing and supporting a thriving mission-oriented educational institution that hope to be a catalyst for positive social change for its students (Jean-Marie et al., 2009; Ryan & Katz, 2007; Shields, 2010; Tillman, Brown, Jones, & Gonzalez, 2006). However, not all school leadership is equal. Indeed, a specific kind of educational leadership is needed to develop and sustain a high performing school (Murphy, Elliot, Goldring, & Porter, 2007; Young, Anderson, & Nash, 2017).

#### **Traditional Filipino School Leadership**

In the Philippines, school leadership in public schools has found its bureaucratic form through national legislation and policies. The most relevant of which is the *Governance of Basic Education Act* of 2001 or *Republic Act 9155* (Sutherland & Brooks, 2013). This law has specified the general structure for school empowerment by defining and reinforcing the

leadership functions of principals and advancing transparency and local accountability of the school officials (Sutherland & Brooks, 2013).

One of the unintentional consequences of such a legislation is how school leadership in the Philippines, both in the public and private sectors, has remained to be traditionally understood as hierarchical or generally principal-centered (Alegado, 2018). This conventional arrangement has placed both academic leadership and institutional management on the principals' shoulders (Alegado, 2018). Brooks and Sutherland (2014) noted that given the limited funds that has been made publicly available for education in the Philippines, it is not surprising that school leadership has also evolved in certain circumstances into a kind of political activity to stay in a position of influence and draw-out resources from local political leaders, division and district heads of the Department of Education, and other resource-rich stakeholders in order to improve school operations. School leaders who were not socially adept or who lacked socio-political capital found it extremely difficult to corner resources and community backing that were essential in their administrative responsibilities (Brooks & Sutherland, 2014).

Thus, to exercise enough influence in the community and formal authority within the school system, school leaders tried to “develop and nurture loyalty in a network of ritual or social relations” (Sutherland & Brooks, 2013, p. 11). A patron-client relationship that thrive on *utang na loob* or debt of gratitude can then become ingrained in the school leaders' psyche as a unique manner of symbolic kinship within the school environment and on the broader community (Sutherland & Brooks, 2013). It is this brand of Filipino kinship in school leadership “that can leverage power and influence in both constructive and destructive ways depending on how leaders use relationships to exert influence” (Sutherland & Brooks, 2013, p. 12). It has been

observed often, however, that this manner of leadership has limited the responsibility of initiating systemic changes in educational policies and practices to the top leader who, at times is forced to act as a “genius with a thousand helpers” (Alegado, 2018, p. 298).

### **Redefining School Leadership**

As contemporary educational scholars have pointed out, school leadership must go beyond an efficient and effective use of managerial skills in pushing for institutional success (Lambert, Zimmerman, & Gardner, 2016). With the intricate and ever-evolving landscape in the world of education and the threat of diminishing material and human resources, leadership in schools with demanding contexts cannot be caught unprepared nor unresponsive to challenges brought about by social inequities (Leithwood et al., 2006; Leithwood & Riehl, 2003). Indeed, an essential function of school leadership, as Lambert, Zimmerman, and Gardner (2016) noted, ought to engage in the various processes in the organization in order to generate and support the conditions for holistic education as well as the common foundation for the art and science of inclusive instruction and learning for all.

**Weighing the impact of a good school leader.** Multiple studies from highly developed nations in North America and Great Britain validated the critical role of a leader on school effectiveness (Huber, 2004). Leithwood, Harris, and Hopkins (2008) stated that the influence and direction that a school leader exercises could serve as the impetus for sustainable development in the school organization and student success.

As such, most educational leadership scholars have agreed that a transformative school leader should eagerly collaborate with others in conceptualizing and proposing a shared vision and purpose for the school that gave immense attention to student learning (Leithwood et al.,

2006; Leithwood et al., 2004; Leithwood & Riehl, 2003) by establishing conditions by which his or her colleagues could also excel and be effective in building-up the school as a professional learning community (Hoppey & McLeskey, 2013; Leithwood & Riehl, 2003; Owens & Valesky, 2015).

Finally, Leithwood and Riehl (2003) emphasized that leadership could be seen more like a function than just a position. This manner of seeing leadership implied that despite having persons vested with formal authority, all members of the school community, especially those acting in collaboration with others in the organization, who could offer direction and wield influence in attaining the aims of the school, were leaders in their own right (Hallinger & Heck, 2010; Leithwood & Riehl, 2003; Rodela & Bertrand, 2018).

**Student learning as indicative of good school leadership.** Next to classroom instruction, school leadership is the most important factor in student learning (Leithwood et al., 2006; Leithwood et al., 2008; Leithwood et al., 2004; Leithwood & Riehl, 2003) despite the challenging contexts of schools serving underserved students. Decades of research from educational leadership scholars already have emphasized this point.

In a paper presented at the 1986 annual meeting of the American Educational Research Association in San Francisco, education leadership and policy scholar Kal Gezi (1986) rejected the notion that the weak academic performance of poor students could simply be attributed to their families' low social-income status. Citing several studies conducted on high performing schools/districts in the 1970s and early 1980s, Gezi (1986) asserted that high-achieving schools typically had proactive and innovative school leaders or administrative teams who had a definite

impact on the instruction of students and the management of the schools as learning organizations.

Klar and Brewer (2013) reiterated Gezi's (1986) findings in a more recent study that assessed how knowledgeable and experienced educational leaders in high-needs school settings managed to institutionalize school reforms for the betterment of their students' learning. They observed that school leaders who had demonstrated a "keen understanding and responsiveness to their challenging demographic, cultural, fiscal, and political contexts," while astutely exercising their leadership skills "around a comprehensive school-wide reform effort," were indispensable in transforming turn-around schools (Klar & Brewer, 2013, pp. 800-801).

A four-year longitudinal quantitative study by Hallinger and Heck (2010) on a large sample of primary schools in the US also supported the conclusion that leadership positively influenced students' learning through the appropriate development of structural and sociocultural systems that supported the learners' ability for continuous improvement. Specifically, Hallinger and Heck (2010) noted that collaborative leadership that consistently emphasized academic excellence in the school was effective in improving student learning in reading and math.

On the contrary, unstable and inconsistent school leadership, as manifested by a high turnover of school administrators, had a detrimental effect on student performance (Miller, 2013). In a study that employed 12 years of administrative data from public schools in North Carolina, Ashley Miller (2013) explored the correlation between principal turnover and student achievement. She concluded that a downturn in student performance oftentimes followed the departure of a principal, and this slump in student accomplishment continued up to the second year of the installation of the new principal before it rose and stabilized again (Miller, 2013).

Preston, Jakubiec, and Kooymans (2013) also identified specific leadership difficulties that affected students' success particularly in small and less established rural schools. Some of these pernicious leadership issues stem from the insufficient professional development and resources available to the school administrators and other key support personnel (Preston et al., 2013).

These representative studies have indicated how educational leadership has had a substantial effect on the school as a professional organization that is supportive of the learning and success of all its students (Hoppey & McLeskey, 2013; Leithwood et al., 2008; Leithwood & Riehl, 2003).

**School culture and relations as indicators of effective school leadership.** There were other subtle elements in effective school leadership cited by several research (Hall & Hord, 2015; Owens & Valesky, 2015). A successful school leader, for instance, needed to understand deeply the school's culture and climate in order to appreciate the organization that he or she headed (Owens & Valesky, 2015). A leader needed to be sensitive and discerning to comprehend and value what was at the core of the school as a living organization—its members and their relationship to culture and climate. This complex interaction built up the organization (Owens & Valesky, 2015). Thus, one of the most vital leadership tasks was really to “help improve [the members'] performance . . . and [properly recognize] that such performance [was] a function of [their] beliefs, values, motivations, skills, and knowledge [as well as] the conditions in which they worked [and learned]” (Leithwood et al., 2008, p. 29). It was the confluence of these factors that could create a culture of growth or stagnation—an organizational ethos that was either open to transformation or fearful of change (Owens & Valesky, 2015).

**Best practices of effective school leaders.** In considering the complex leadership undertakings within the context of a learning organization that has prioritized the students' needs, Leithwood et al. (2008) observed that successful leaders seemed to share an inventory of basic leadership practices. They enumerated the four interrelated core practices as follows: (a) building a vision and setting directions, (b) understanding and developing people, (c) redesigning the organization, and (d) managing the teaching and learning program (Leithwood et al., 2008, p. 11). The following considerations are some of the conceptual development of these principles which have been further elaborated according to additional related literature.

***Setting the organizational vision and direction.*** One of the most cited basic leadership practices in educational leadership literature is the capacity of the leader to set and communicate a clear organizational vision that directs the school towards its goals (Leithwood et al., 2008). This practice is instrumental in influencing the motivation of the members of the school community (Leithwood et al., 2008). It is also a common feature in the skill sets that are taught in various leadership programs, both as a standard in secular or non-sectarian schools (National Policy Board for Educational Administration, 2015, 2018) and religious, specifically, Catholic educational institutions (Catholic Educational Association of the Philippines [CEAP] & PPH Educational Foundation, 2016; Morten & Lawler, 2016).

According to the crafters of the *Performance Expectations and Indicators for Education Leaders* (Sanders & Kearney, 2008), school leaders have a crucial obligation to set and guide their schools' path towards students' success. By engaging the school community to gain consensus, school leaders take on the principal obligation of creating a vision for their institutions and generating ways of attaining their mission:



[e]ducation leaders are accountable and have unique responsibilities for developing and implementing a vision of learning to guide organizational decisions and actions. Education leaders guide a process for developing and revising a shared vision, strong mission, and goals that are high and achievable for every student when provided with appropriate, effective learning opportunities. (Sanders & Kearney, 2008, p. 13)

***Managing human resources.*** Developing and managing human capital is crucial in providing the necessary knowledge and capacities that aid teachers and other staff in accomplishing the immediate organizational goals of the school for its students (Leithwood et al., 2008). It is also indispensable in motivating people and forming the right disposition for them to show commitment and resiliency in striving to attain the school's long-term mission (Leithwood et al., 2008; Leithwood & Riehl, 2003). In a U.K. study conducted by Alma Harris (2002) who tried to identify certain leadership qualities in principals and head teachers in confronting the complex problems of British schools that had been classified then by England's Department for Education and Skills (DfES) as "facing challenging circumstances," she found evidence that aside from ascertaining that the vision and mission of the school had been understood and appropriated by all school personnel, encouraging positive relationships and apportioning leadership responsibilities with other school staff were instrumental in leadership effectiveness.

Another case in point is the study conducted by Goldfarb and Grinberg (2002). They argued that in an urban educational setting, a leader who was advocating for transformation might have a better chance of doing so if he or she would allow for the participation of others through flexible and democratic ways of seeking solutions to complex problems (Goldfarb & Grinberg, 2002). The framers of the Philippine Catholic School Standards (CEAP & PPH Educational Foundation, 2016) also expected a similar model of collaboration among Philippine

Catholic school leaders so that they might manifest clearly the “principles of collegiality, co-responsibility, and subsidiarity . . . by providing structures to delegate responsibility and authority and ensure accountability . . . [that would] empower members of the school community to take initiatives for the attainment of the school’s vision-mission” (p. 35).

In a case study of a school principal who had a record of success in leading an inclusive school, David Hoppey and James McLeskey (2013) asserted that for a school leader to be a key participant in effecting school improvement that supported teachers’ efforts to meet their students’ needs, the leader must be an exemplar of what he or she taught. Part of this has been consistently showing care and personally investing in the teachers by displaying sincere trust in them, patiently listening to their ideas and concerns, as well as treating everyone in the organization fairly (Hoppey & McLeskey, 2013).

***Redesigning the organization.*** The learning and working environment within the whole organization is indicative of a more systemic institutional reality of the school’s culture and climate (Owens & Valesky, 2015). As previously mentioned, educational leaders influence too, the culture and climate of an organization which in turn affect work contexts or the conditions and relationships in the school (Leithwood et al., 2008; Owens & Valesky, 2015). A school leader has to appreciate deeply the value of context not just in teaching and learning but in leading the school as an organization in order to understand how the members of the school community relate with one another and to the structures that are in place (Owens & Valesky, 2015).

As Owens and Valesky (2015) have observed, each member’s interaction with the institution, whether it is explicit or not, marks their standards and hopes that are so much part of

what makes them who they are, and their organization what it is. To see firsthand the integral relations between the members who make up the institution and the environment in which they interact professionally and personally is crucial to leading and redesigning the school organization (Owens & Valesky, 2015). It is important for a leader to be cognizant of how the members and affiliates of the school organization perceive their living tradition and ongoing history (Owens & Valesky, 2015). It is vital as well for the school leader to be reflective of how everyone's individual and collective actions and choices can speak of their beliefs and principles in relation to the school's goals (Leithwood et al., 2008; Owens & Valesky, 2015).

***Managing the instructional infrastructure.*** Ultimately, for improvements to be sustainable and relevant, they have to be incorporated within the teaching and learning infrastructure of the school and those responsible for the students' success (Leithwood et al., 2008). This essentially means that a school leader must be competent at providing teacher support and development to all the faculty (Hoppey & McLeskey, 2013; Leithwood et al., 2008). An effective school leader must also show a capacity to shield the teachers, to an extent that it is helpful and healthy, from the negative and even demoralizing aspects of external pressure that may come from "high stakes testing and the overemphasis on narrowly defined accountability measures" (Hoppey & McLeskey, 2013, p. 250).

Gezi (1986) also emphasized that in leading struggling schools, a school leader must be adept at teacher evaluation. Harris (2002) shared the same insight as she emphasized the valuable leadership practice of diligently monitoring and assessing the quality of instruction in addition to promptly addressing poor teaching with programmatic strategies for improvement.

Another way of looking at this leadership practice is safeguarding the school's core operational vitality (CEAP & PPH Educational Foundation, 2016; Morten & Lawler, 2016). A Catholic school that produces successful students because of excellent teaching can lead to higher enrollment, greater external support and funding, as well as a stronger and more professional workforce (CEAP & PPH Educational Foundation, 2016).

### **Social Justice Leadership in Schools**

From an appreciation of the value of school leadership in relation to the institution in general and the learning and welfare of students in particular, comes a distinctive type of educational leadership that pushes the conversation further: educational leadership for social justice (Bogotch, 2000; Goldfarb & Grinberg, 2002; Jean-Marie et al., 2009; Oplatka & Arar, 2016). Social justice leadership in schools responds to the changing demographics of students in an increasingly diverse society, the stark achievement gaps of underserved students, and the undeniable reality of social inequities that are based on ethnicity, gender, abilities, and socioeconomic status within the school systems (Bogotch, 2000; Goldfarb & Grinberg, 2002; Jean-Marie et al., 2009; Kemp-Graham, 2015).

### **The Three Cs of Educational Leadership for Social Justice**

Educational leadership for social justice has been defined and understood in a myriad of ways (Kemp-Graham, 2015). Bogotch (2000) spoke about it as highly contextualized and experiential such that it might not have a fixed meaning or relevance outside its practice in a particular school and community. DeMatthews (2015) agreed with Bogotch (2000) as he pointed out that leadership for social justice varies across school contexts due to numerous individual, social, political, and organizational factors that impinge upon it.

**Critical.** Nonetheless, school leadership scholar George Theoharis (2007) defined this brand of educational leadership in the US context as the leaders' astute awareness and concentration of their priorities on issues related to "race, class, gender, disability, sexual orientation, and other historically and currently marginalizing conditions in the United States" (p. 223). Kemp-Graham (2015) defined leadership for social justice as responsible governance that emphasizes "equity, ethical values, justice, care, and respect in educating all students regardless of race and class, with a high-quality education, and therefore, closing the achievement gap between White, middle class students and minority students" (p. 104).

**Corrective.** Similarly, the study of Rivera-McCutchen (2014) showed that educational leaders, who concerned themselves with the ethics of advancing all their students' learning and growth, had a fundamental disposition to correct any injustice that might have been caused wittingly or unwittingly by themselves and by their institutional structures. It was a powerful way of leading that was unsympathetic of a status quo that harmed those who were oppressed (Rivera-McCutchen, 2014), and was purposefully transformative in "reclaiming, appropriating, sustaining, and advancing inherent human rights of equity, equality, and fairness" in the school (Goldfarb & Grinberg, 2002, p. 162).

Social justice leadership in schools, therefore, begins from a critically reflective leader's moral obligation (Rivera-McCutchen, 2014). It is a proactive stance to uphold the human dignity of all members of the educational community, particularly those who have been systematically marginalized (Brown, 2004a; Chubbuck, 2007; Frattura & Capper, 2007; Shields, 2010). It persists in finding ways to ameliorate the learning conditions and opportunities of historically oppressed and culturally isolated students (Frattura & Capper, 2007; Goldfarb & Grinberg, 2002;

Shields, 2010; Theoharis, 2009). The practice of social justice leadership then requires not just practical skills but rich experiences in consistently advocating for inclusion and equity from various fronts, and the personal fortitude that propels leaders to engage in this effort (DeMatthews, 2018)

**Community-building.** To lead schools with social justice in mind also requires the nurturance of communities where caring and supportive relationships between and among teachers, parents, and students are treasured (Brown, 2004a; DeMatthews, 2015; Litton, Martin, Higareda, & Mendoza, 2010; Theoharis, 2009; Tillman et al., 2006). Thus, inclusivity is a fundamental principle for social justice leadership as it admits with great insight and humility that exclusion and marginalization are complex issues that are not easily solved and yet must be earnestly and continuously addressed (Allen, Harper, & Koschoreck, 2017; DeMatthews, 2015; Hoppey & McLeskey, 2013; Keys et al., 1999; Theoharis, 2009).

Ultimately, this manner of leading in schools wishes first to liberate the leaders from false notions of privileges and oppressive power. The emancipation of the self is crucial in embracing the ideals of inclusivity and justice. These values can hopefully guarantee that, irrespective of ethnicity, gender, sexual orientation, age, ability, language, religion, or socioeconomic status, all students under their care are respected and supported to receive the best possible education that will prepare them to be ethical citizens and capable advocates for their rights and the good of others (Allen et al., 2017; Brown, 2004a; Theoharis, 2009; Tillman et al., 2006).

## Some Common Qualities of Socially Just Leaders

Although it may be challenging to prescribe a definitive listing of traits for socially just school leaders (Furman, 2012; McKenzie et al., 2008; Shields, 2010; Theoharis, 2007) there is value in recognizing certain shared, though non-essentializing qualities of such leaders (Bogotch, 2000; Jean-Marie et al., 2009; McKenzie et al., 2008). Most scholars, for instance, would agree that social justice school leaders are “action-oriented and transformative, committed and persistent, inclusive and democratic, relational and caring, reflective, and oriented toward a socially just pedagogy” (Furman, 2012, p. 195).

**Transformed and transformative.** To be leaders who are transformative and action-oriented, Furman (2012) first emphasized what previous authors like Brooks and Miles (2006), Jean-Marie, Normore, and Brooks (2009), and Shields (2010) had pointed out: Leaders must possess a well-developed and incisive critical awareness of the oppression and exclusion that occurs within the school systems. They comprehend deeply the harmful effects of the policies and practices of repressive institutional powers that perpetuate the status quo that lean favorably towards certain groups but isolate and oppress others (Furman, 2012).

School leaders must also have a thorough understanding of the relationship between school culture, social justice, and student success (Bustamante, Nelson, & Onwuegbuzie, 2009; Flanagan, Cumsille, Gill, & Gallay, 2007; Young et al., 2017). In the mixed-method study of Bustamante, Nelson, and Onwuegbuzie (2009), who used the *Schoolwide Cultural Competence Observation Checklist* to obtain the cultural perception of school administrators, they observed that critical educational leaders examined their personal biases, beliefs, and privileges concerning others who did not share their ethnicity or social background. These leaders

developed as well, culturally responsive competencies to evaluate schoolwide cultural proficiency in order for them to prevent the reproduction of social injustices in their respective schools (Bustamante et al., 2009).

Moreover, Jean-Marie et al. (2009) stressed that over time, social justice leaders have not only been critical activists but true transformational public intellectuals who could guide others to a more nuanced awareness of various forms of iniquities (i.e., racism and classicism) that beset those in the margins.

When one has gained sufficient critical awareness of the social iniquities that imposed upon the inherent dignity of the students and those who supervised their care in the school, socially just leaders, as Furman (2012) had pointed out, find themselves at a better vantage point to conceptualize and create “new institutionalized possibilities (Goldfarb & Grinberg, 2002, p. 162). For Frattura and Capper (2007), such systemic transformation must compel leaders to improve access to high-quality teaching and learning, upgrade the value of curriculum and instruction, establish structural support for educational services, and secure consistent policy implementation and sufficient funding for the progress of inclusivity and equity in schools. This personal and communal transformation indeed is the basis for transformative leadership that aims to unshackle and not further oppress (Freire, 2005).

**Committed and persistent.** To take on such a seemingly daunting endeavor, a school leader for social justice must have internal strength and fortitude (Furman, 2012). Indeed, researchers have noted that such leaders might even have to dig deep into their spirituality and faith (i.e., faith in a Higher Being for those who believe and in the goodness of humanity as well), in order to trudge forward in this difficult enterprise (Coghlan, 2005; Dent, Higgins, &



Wharff, 2005; Keys et al., 1999; San Juan, 2007; U.S. Jesuit Task Force on Formation and Leadership, 2009).

In a series of interviews for a comprehensive qualitative study conducted by Theoharis (2010), he noted that successful principals who ran inclusive schools manifested a “passionate spirit, a deep commitment to justice, and a style of ‘arrogant humility’ [that] characterized their leadership” (p. 356). Riester, Pursch, and Skrla (2002), who conducted another qualitative case study on principals who managed their schools through the leadership lens of social justice, showed that the participants demonstrated a stubborn persistence in their effort to promote a democratic school culture despite the multiple barriers that they needed to overcome.

Related to this, Weiner (2003) pointed out that educational leaders for social justice must be prepared to lead in a context of having “one foot in the dominant structures of power and authority,” and yet not allowing themselves to easily fall prey as “willing subjects of dominant ideological and historical conditions” (p. 91). This ethical character of resilience and integrity would be tested over time but should only become stronger in its constant practice through the leaders’ day to day decisions to include rather than exclude those in the peripheries (Allen et al., 2017; Harris, 2002).

**Inclusive and democratic.** Indeed, inclusion is frequently considered as *the* social justice leadership goal in schools (Furman, 2012). As previously mentioned, educational leaders who strove to establish a more socially just educational institution would place the notion of inclusivity at the forefront of their minds (Allen et al., 2017; DeMatthews, 2015; Hoppey & McLeskey, 2013; Keys et al., 1999; Theoharis, 2009). They would “foster a supportive, learning

school culture that welcomes, affirms, and learns from student and community diversity” (Kose, 2007, p. 279).

In a two-year ethnographic study, Mummud Khalifa (2012) showcased the role of a principal as an inclusive community leader. Through the school leader’s openness and willingness to engage stakeholders in the municipality where his urban alternative high school was located, he was able to gradually build trust and rapport between the school for high-risk students and their local community (Khalifa, 2012). With such a relationship of trust, the parents and other external parties showed great support for the school’s programs that were instrumental in improving the academic outcomes of most of its students (Khalifa, 2012).

Moreover, Rodela and Bertrand (2018) affirmed this inclusive and democratic leadership principle by boldly asserting that students, parents, and their broader community may even have a greater stake than the educators themselves; thus these “informal” leaders’ power to instigate social change should not be taken lightly by educational leaders. In other words, educational leaders for social justice are proactive change agents who are never individualists, but instead are always working with others in growing spheres of collaboration (Young, 2013).

Theoharis (2008) observed this quality in an ethnographic study of urban school principals who, by consistently modeling democratic principles and values of fairness, effectively encouraged standards and practices of social justice in their staff members. James Ryan (2006) spoke about the value of building a participatory school culture that did not thoughtlessly promote the interests of the top management or the dominant majority but instead, educated all members of the community to develop critical consciousness through policies and practices that listened to and respected the voices of minority groups. He also affirmed that

“those who promote inclusion believe that social justice can be achieved if people are meaningfully included in institutional practices and processes” (Ryan, 2006, p. 5). Similarly, Goldfarb and Grinberg (2002) saw as extremely important the “authentic participation” (p. 9) of other members of the school community through the leaders’ advocacy for nurturing dialogue and inclusive decision-making strategies. Leaders for social justice go the extra mile in seeking ways to work with others who share the same passion for sustainable social change in order to cultivate a “collective transformative agency” (Rodela & Bertrand, 2018, p. 26).

**Relational and caring.** This sense of inclusivity, too, becomes the foundation for caring relationships in schools that are led by social justice leaders as noted by Rivera-McCutchen (2014). These relationships are further nourished by mutual respect and sincere communication (Furman, 2012). Going back to an earlier research of Theoharis (2007), he observed that school leaders who were effective in opposing systems of inequities in their schools had done so by recognizing and supporting all members of the school community in the effort to dismantle barriers to social change. These leaders also moved away from stereotypical and patronizing ways of educating historically marginalized populations (Theoharis, 2007).

Educational leaders for social justice are wary of the subtleties of false charity (Freire, 2005). To be inclusive in caring relationships is to unequivocally recognize the equality of dignity between leaders and members of the school organization; thus, “Leaders who do not act dialogically, but insist on imposing their decisions, do not organize the people—they manipulate them. They do not liberate, nor are they liberated: they oppress” (Freire, 2005, p. 127).

Furthermore, in extending service to the oppressed, a leader for social justice does not rob persons and groups, who have already been marginalized, of their agency to stand up for their

own rights because doing so, only dehumanized further “the ‘rejects of life,’ to extend their trembling hands” for alms (Freire, 2005, p. 45). Paulo Freire (2005) advocated that “[t]rue generosity lies in striving so that these hands—whether of individuals or entire peoples—need be extended less and less in supplication, so that more and more they become human hands which work and, working, transform the world” (p. 45).

**Reflective.** Leaders for social justice are mindful of the complexity of the specific situation or context in which they find themselves. As such, they are able to think analytically, on the level of systems, on how inequities can be addressed (Argyris, 1982; Fischer-Lescano, 2012; Theoharis, 2009). This awareness often begins with self-reflection that expands to a critical consciousness of the structural injustices that dehumanize people in society in general, and the minority members of their school communities in particular (Brown, 2004a; Tillman et al., 2006).

Critical awareness is crucial for the leaders to recognize and go against the biases that they might have internalized, mainly because they had been socialized in a context far distinct and distant from those they currently held (Brown, 2004a; Dantley, 2008). It is a process of humbly unlearning misconceptions about those in minority groups (Kaak, 2011). It is also a process of deliberately embracing their (the leaders’) own vulnerability and allowing it to be an opening to the vulnerabilities of the people with whom they wished to struggle with in the work for social justice (Freire, 2005). This whole dynamic process is what Freire (2005) called conscientization. Dantley (2008) also spoke about this as a kind of “auto-inquiry or self-reflection [that set] the standard for how school leaders operate on a daily basis. It asks them to come clean with their own prejudices and their own issues . . . ” (Dantley, 2008, p. 455).

Through honest self-reflection, the leaders come to a fresh understanding of their own experience of “oppression” and how this insight compels them to be with the marginalized in the community and work not just for them but with them in overcoming the systemic oppression in their context (Freire, 2005). Social justice leaders in schools have hearts that suffer with the poor and rejoice even in the small victories of the oppressed against the oppressors (Gutiérrez, 2009; McKinney, 2018). These are hearts that beat with the hearts of those who suffer and thus, hearts that are critically conscious of the harsh predicament of the people around them, most especially of their students (Brown, 2004a; Tillman et al., 2006). This heightened sense of “critical awareness of oppression, exclusion, and marginalization” (Brooks & Miles, 2006, p. 5) recognizes deeply and understands profoundly how dominant power structures and systems can unscrupulously advance the agenda of some favored class but undermine further the weak and marginalized (Brown, 2004a; Tillman et al., 2006).

**Oriented to socially just pedagogy.** Finally, a common trait among school leaders advocating for social justice is their dedication towards forming and sustaining a socially just pedagogy for their students (Furman, 2012). In looking at the various studies of social justice scholars, Brad Kose (2007) wrote about the need for school leaders to be skilled at assisting their faculty in conscientiously assessing their students’ (coming from diverse backgrounds) learning outcomes. The school leaders must also encourage their teaching and support staff to regularly check themselves for possible biases regarding ethnicity, gender, class, and the like, that deleteriously affect the learning of their pupils (Kose, 2007). Theoharis (2010) also wrote about this aspect of social justice leadership by encouraging the necessity to improve the core learning contexts of students through the enhancement of curricular programs and ongoing teacher

professional development that raises student achievement. Educational leaders for social justice must also go beyond critique and, instead, creatively develop culturally responsive school systems and programs for diverse groups of learners through the use of sound research (Shields, 2010; Theoharis, 2010).

### **Barriers and Limitations to Social Justice Leadership**

Like all transformative initiatives, social justice leadership is easier conceptualized than implemented. As Furman (2012) indicated, social justice leadership could run into barriers that obstructed it from achieving its noble goal for the students and the rest of the learning community. Some examples are the pervasiveness of deficit thinking about the marginalized, the overvaluing of technical and bureaucratic leadership over ethics of service, and the physical and emotional burden to individual school leaders who advocate for change in a context where neo-liberal values still dominate (Furman, 2012; Theoharis, 2010). Truly, such barriers are so prevalent that according to Theoharis (2009), they occur not just in school sites and district levels but in every turn of the institutional educational system.

In addition to these obstacles, Colleen Capper and Michelle D. Young (2014) also identified several limitations and possible incongruences within the purview of educational leadership for social justice. First, they saw this in the definition and practices of inclusion, which got interchanged with integration (Capper & Young, 2014). They argued that though the term got thrown around in a lot of the literature they reviewed about social justice leadership, it has remained poorly defined and usually used only for students with disabilities (Capper & Young, 2014). The second limitation that they observed was the failure in these studies to present the intersection of identity and difference, so much so that there was an abundance of

research made on specific marginalized student groups like the students of color but little on those who experience oppression because of their religious belief or sexual orientation (Capper & Young, 2014). Moreover, whenever students were identified in these studies to belong to any of these commonly held marginalized groups, there was also a failure to recognize that their identity can intersect with other dimensions of their social realities (i.e., a gay Evangelical student of color with a learning disability) (Capper & Young, 2014). The third limitation that they presented was the mixed messages on the value of student learning and achievement in the formulation of current educational policies (Capper & Young, 2014). Lastly, Capper and Young (2014) asserted that there was a tendency to speak about social justice leadership as a quality exercised only by exceptional and heroic individuals instead of a critical collaboration of various people and leadership teams.

### **Towards a Leadership Formation Framework**

Notwithstanding the multiple meanings and descriptions that have been attributed to educational leadership for social justice, education scholars have been one in affirming that it is demonstrated through critically reflective “actions, skills, habits of mind and competencies that are continually being created, questioned and refined . . . to ensure the academic success of all school children” (Kemp-Graham, 2015, p. 149). Moreover, with schools no longer just seen as places to “preserve and transmit traditional values to younger members of society . . . but are [expected] to be vehicles for social change” (Owens & Valesky, 2015, p. 216), school leadership for social justice has truly become essential in educational institutions (Frattura & Capper, 2007; Theoharis, 2007, 2009, 2010). The logical question that follows then is: How do we prepare and develop such leaders for today’s schools?

## **Preparing Educational Leaders for Social Justice**

In this final section of Chapter 2, I will present relevant literature on leadership preparation and why such intentional programs are invaluable for aspiring school leaders. After which, I will present specific educational leadership preparation program standards and models in the US that may also be applicable in the challenging contexts of the Philippines. Finally, I will introduce some studies that open up possibilities for incorporating Catholic and Jesuit principles in these educational leadership preparation programs.

### **The Rationale Behind Leadership Preparation Programs**

Why is there a need for educators to undergo an intentional leadership preparation program, especially as they begin their careers in school administration? The conventional thought is that school leaders and other key administrators need only to be well-experienced and certified educators (Bush, 2008). There has been, however, a change in perspective. Now, there is a growing recognition that leadership is certainly a profession that demands specific training, and so various countries have created standards and formal development opportunities for aspiring or novice educational leaders (Bush, 2008).

**To resist structural injustice in schools.** Educational leadership scholars, Michelle D. Young and associates (2017) have asserted that these programs are necessary not just to prepare future administrators to lead in the contemporary context but to prod them forward to “think beyond what currently exists—transforming education as we know it” (p. 228). Truly, there is a kind of purposeful preparation that is needed to establish and strengthen educational institutions that resist the reproduction of systemic injustice and, instead, bring about inclusive and just learning communities for all learners (Black & Murtadha, 2007; Young, 2013).



**To uphold values.** Black and Murtadha (2007) noted that there was a turn in educational leadership preparation research towards moral, critical, and value-laden perspectives when a number of scholars started expressing their critique against “dominant, non-normative, and hierarchical conceptions of school leadership that drove practice and preparation” (p. 2). Margaret Grogan (2002) in her introduction of a special edition of the *Journal of School Leadership* acknowledged that this development in educational leadership scholarship brought into light the limitations of over-simplified school administration standards that fail to recognize and respond to the challenging local, national, and global educational contexts.

Moreover, this shift in the leadership research paradigm, provided the impetus for critical scholars to come together to “interrupt the continued maintenance of the status quo” (Grogan, 2002, p. 115). Critical theorists have blamed traditional hierarchical leadership models for the reproduction of inequities in schools (Black & Murtadha, 2007; Young, 2013). Lisa Lucilio (2009), who wrote about professional development programs that were made available to the faculty of several Catholic schools in two Midwestern Catholic dioceses in the US, acknowledged the perception of several disenfranchised teachers that the stifling “bureaucratic control has a dysfunctional consequence for integrated leadership and instrumental effectiveness in Catholic schools” (p. 61).

**To advocate inclusivity in leadership.** Indeed, Pounder, Reitzug, and Young (2002) have taken on the position that social justice is not simply a “means that serve the end of overall school improvement, but rather are both means and ends” (p.262). They emphasized that the progress in the learning outcomes of students is not the only indicator of school improvement (Pounder, Reitzug, & Young, 2002). It was clear to them that “enhanced community and greater

social justice are also essential indicators” and therefore, should be “a strong focus for the preparation of educational leaders” (Pounder et al., 2002, p. 262).

Since then, it has become evident that the growing conversation about social injustice in schools has prompted educational leaders to question the assumptions that form traditional school policies, shape obstinate bureaucracies, and fuel unjust practices (Cambron-McCabe & McCarthy, 2005). School leadership programs that are cognizant of these issues and wanted to make a difference in the educational field have been developed to “prepare new leaders to critically inquire into the taken-for-granted structures and norms that often pose insurmountable barriers for many students’ academic success” (Cambron-McCabe & McCarthy, 2005, p. 204). In other words, this movement in the educational leadership discourse has signified a shift towards a greater sense of inclusiveness and activism that would have “profound implications for social justice and the education of school leaders” (Cambron-McCabe & McCarthy, 2005, p. 217).

**To set leadership standards.** It is vital then that future school leaders rigorously and comprehensively prepare in a manner that is worthy and incumbent of their profession (National Policy Board for Educational Administration [NPBEA], 2015; Young et al., 2017). Professional standards for educational leaders are necessary to define and uphold the nature and quality of their work (NPBEA, 2015). They are foundational for all levels of school leadership but most advantageous as a guide for novice school leaders (NPBEA, 2015).

***National Educational Leadership Preparation (NELP) standards.*** In the United States, the National Policy Board for Education Administration (NPBEA), which is a consortium of professional organizations dedicated to improving school leadership nationwide, took the

initiative in securing such standards. NPBEA approved an updated Professional Standards for Educational Leaders (PSEL) in 2015 that replaced the former Interstate School Leadership Licensure Consortium (ISLLC) standards (NPBEA, 2015, 2018; Young et al., 2017). The updated PSEL boasts of a sounder and more distinct emphasis on the students and their diverse learning needs by defining central educational leadership tenets that school leaders need to know and be able to do in order to guarantee that all pupils in their schools are receiving high-quality education that equips them with 21st century skills (Cambron-McCabe & McCarthy, 2005; NPBEA, 2015). It is these standards that will become the aligning basis of the National Educational Leadership Preparation (NELP) standards (Young et al., 2017).

It is important to note, however, that the NELP standards, though aligned to PSEL, have a distinct aim as they (NELP) specifically provide performance expectations for beginning level school leaders (as opposed to seasoned administrators) at the site (building-level) and district positions (Young et al., 2017). The eight NELP preparation program standards (building level) are as follows (NPBEA, 2018):

- *Mission, vision, and improvement*: the awareness, knowledge, and skills to collaboratively lead, develop, and implement the school’s mission, vision, and processes that manifest the “core set of values and priorities that include data use, technology, equity, diversity, digital citizenship, and community” (p. 11).
- *Ethics and professional norm*: the awareness, knowledge, and skills to “to understand and demonstrate the capacity to advocate for ethical decisions and cultivate and enact professional norms” (p. 13).

- *Equity, inclusiveness, and cultural responsiveness*: the awareness, knowledge, and skills to “develop and maintain a supportive, equitable, culturally responsive, and inclusive school culture” (p. 15).
- *Learning and instruction*: the awareness, knowledge, and skills “to evaluate, develop, and implement coherent systems of curriculum, instruction, data systems, supports, and assessment” (p. 18).
- *Community and external leadership*: the awareness, knowledge, and skills “to engage families, community, and school personnel in order to strengthen student learning, support school improvement, and advocate for the needs of their school and community” (p. 21).
- *Operations and management*: the awareness, knowledge, and skills “to improve management, communication, technology, school-level governance, and operation systems to develop and improve data-informed and equitable school resource plans and to apply laws, policies, and regulations” (p. 24).
- *Building professional capacity*: the awareness, knowledge, and skills “to build the school’s professional capacity, engage staff in the development of a collaborative professional culture, and improve systems of staff supervision, evaluation, support, and professional learning” (p. 27).
- *Internship*: have successfully completed an internship program “under the supervision of knowledgeable, expert practitioners that engages candidates in multiple and diverse school settings and provides candidates with coherent, authentic, and

sustained opportunities to synthesize and apply the knowledge and skills identified in” the first seven standards. (p. 30)

***Research-based standards.*** Although there are some scholars such as Gary Anderson (2001) who did not fully adhere to the value of having set leadership preparation standards because of what he saw as problematic language employed in these standards that centered “on control, public relations, deficit theories of children and poor communities, avoidance of controversy, glibness and anti-intellectualism” (p. 199), there were those like Young, Anderson, and Nash (2017) who stated that these standards have “a positive impact on the field in that they provide a common vision for educational leadership preparation and practice” (p. 229). Regardless of one’s point of view on the value of leadership preparation standards, it has been shown that in a comprehensive review, analysis, and mapping of available school leadership research about the various components of NELP, these standards’ validity have been adequately supported by various studies on educational leadership practices that bring about an effective professional learning community and student success (Cambron-McCabe & McCarthy, 2005; Young et al., 2017).

### **Preparation Programs**

Admittedly, standards, no matter how painstakingly crafted by policy-makers and supported by multiple studies have little use and impact in schools if there are no valid programs of preparation, implementation, and assessment to indicate that they have been properly taught, learned, and applied (Cambron-McCabe & McCarthy, 2005). In the US, one way to address this concern is to base preparation programs for potential school leaders on these standards and use them as almost the de facto curriculum for leadership preparation (Young et al., 2017). The

following section is a presentation of some of the approaches in leadership programs that focus on the social justice dimension of school leadership preparation.

### **Program Approaches**

To better understand the various designs, components, and models of preparation programs, it is noteworthy to appreciate how preparing social justice educational leaders can be accomplished in various approaches (Capper et al., 2006; McKenzie et al., 2008; Young & Laible, 2000).

**Personal, institutional, and multiple fronts.** In the case of educators who are proponents of anti-racism in schools, Young and Laible (2000), for instance, identified three possible approaches: that of the personal, institutional, and multiple fronts. A personal approach of learning about racism as a social justice issue could arise from individuals taking steps that “seek to develop an anti-racist consciousness through discussion and personal contact with members of diverse groups” (p. 391). The institutional approach broadens the scope of the learning by “having individuals understand the institutionalization of White racism in our society, and once understanding is developed, to work against it” (p. 392). Further still, the multiple fronts approach “encourages individuals to both see White racism as systemic and to explore the personal dimensions of White racism” (p. 392).

**Interrelatedness of approaches.** Young and Laible (2000) asserted that underlying each of these approaches is the fundamental notion that we are all immersed in the effort for or against social justice and choosing which side we are on can largely be dependent on our critical awareness of the reality of this world in which we live and toil. Accordingly, Young and Laible (2000) also illustrated that in addressing one area of our being (i.e., consciousness), another

critical area (i.e., knowledge and/or skills) is affected (Capper et al., 2006). What also needs attention for such growth in leadership students is an academic environment where they can explore and take affective and intellectual risks towards the concerted effort for social justice (Capper et al., 2006; Young & Laible, 2000).

These insights can lead one to believe that indeed well-developed preparation programs for educational leadership are feasible and impactful in changing not just the dispositions and perspectives of students but expanding their capabilities in addressing actual social justice issues that they encounter in their areas of influence (Allen et al., 2017).

### **Program Designs**

The basic facets of educational leadership preparation programs that emphasize social justice are recognizable within its program design (Berkovich, 2017). A study conducted by Izhak Berkovich (2017) proposed a meta-conceptual framework that categorized leadership preparation programs into three basic designs: traditional, attitude development, and activist. He considered the latter two (i.e., attitude development and activist designs) as those that more explicitly lean towards a social justice aim (Berkovich, 2017).

**Traditional program design.** The traditional design is inclined to concentrate on building sound managerial and leadership skills and often segmented into discrete subject areas (Berkovich, 2017; Darling-Hammond, LaPointe, Meyerson, & Orr, 2007). Tony Bush (2008), for example, highlighted the need for a core curriculum in such traditional programs that taught management of teaching and learning, handling issues pertaining to legal and policy matters, and managing human and material resources. Good leadership in traditional programs required

efficient administration to keep schools focused and accountable in delivering government mandated 21st century programs (Bush, 2008).

**Attitude development program design.** Furman (2012) and McKenzie et al. (2008) tried to distinguish leadership preparation programs that have a social justice orientation either between those that tended towards strengthening critical consciousness on one hand or promoting activism on the other. The distinction, though, was not exclusive of each other's social justice goals but simply differed in emphasis (Berkovich, 2017).

Attitude development programs are leadership preparation courses that are reflection-oriented and aim to cultivate critical consciousness among students in order for them to acquire a wide perspective on issues related to privileges, inequalities, and power structures (Allen et al., 2017; Berkovich, 2017; Brown, 2004a; Cambron-McCabe & McCarthy, 2005; Capper et al., 2006; Tillman et al., 2006).

In a study conducted by Allen and associates (2017), they showed that even just through a five-week online course that required students to read various social justice materials and engage in weekly discussions about them, the students already exhibited a positive change in their dispositions about (a) placing the common good over personal interests, (b) appreciating diversity as an asset, (c) working for a safe and supportive learning environment, (d) assuring the learning of all students, and (e) building-on and strengthening diverse social and cultural assets (p. 41). Brown (2004a) also affirmed that by allowing leadership students to actively participate in programs that required them to seriously examine their epistemological suppositions and beliefs, as well as their ontological contexts and historicity, they could become more adept at working with and influencing others in pushing for social change.



**Activist program design.** Aside from programs which have a greater orientation towards reflection that leads to a shift in attitudes and beliefs, there are leadership preparation programs that focus on activism (Berkovich, 2017; Heggart, 2015). Drawing inspiration from the seminal work of Paulo Freire (2005), Keith Heggart (2015), for instance, proposed that leadership students should move away from the banking concept of education and instead take on the challenge of engaging in problem-posing education that identifies real issues in their school communities and, by working with others including those affected by these concerns, find solutions for them. Heggart (2015) also suggested a series of questions that can be used in order to evaluate the levels of activism that a leadership program demands from its students, such as the following (pp. 286–287):

- What community partnerships were we able to foster in the program?
- In what ways was the program situated in the real world?
- What exit points does this program provide for students to pursue their own interests and passions at its conclusion?
- What transferable skills does the program provide students with?
- What is the program’s link to social activism?

### **Preparation Program Models**

Various researches have emphasized several important aspects of preparation programs for educational leadership for social justice depending on which model they follow. Each, however, has highlighted the value of critical consciousness and praxis in leadership development programs that aimed to be transformative for the future leaders and their

constituents (Allen et al., 2017; Berkovich, 2017; Brown, 2004a; Bustamante et al., 2009; Furman, 2012; Jean-Marie et al., 2009; McCarthy, 2002)

**Brown model.** In a series of papers written by Kathleen M. Brown (2004a, 2004b, 2006), she used weaving as an extended metaphor for educating future school leaders. She began by emphasizing the need for self-reflection among students of leadership because this would help identify and counter prejudices and assumptions against a socio-cultural background that may be different from their own, and thus, hamper their effort to be inclusive in their instruction and leadership approaches (Brown, 2004a). She spoke about the longitudinal “warp” of the preparation program as composed of theories related to adult learning, transformative learning, and social criticism (Brown, 2004a). She then likened the three pedagogical approaches of critical reflection, rational discourse, and policy praxis as the traversing “woof” in the preparation program that would increase the leadership students’ consciousness, appreciation, and praxis of social justice (Brown, 2004a). With her extended metaphor, Brown (2004a) also described several ways to develop the future school leaders’ “awareness, acknowledgement, and action” (p. 80) through life history interviews, reflective analysis journals, prejudice-reduction workshops, cross-cultural interviews, cultural autobiographies, diversity panels, activist action plans, and “educational plunges” in socio-cultural contexts different from those of the leadership students’.

**Furman model.** Gail Furman (2012), on her part, centered her model on the Freirean dialectic between reflection and action. She argued that praxis can be a “powerful, unifying concept as regards leadership for social justice because it captures the dynamic interplay between the reflection and action needed for this work in schools” (Furman, 2012, p. 213). She explored

the various leadership capacities needed to live-out praxis and how these can be incorporated and further developed in the content of preparation programs for aspiring educational leaders for social justice (Furman, 2012). She then elaborated on how the dynamics of reflection-action can be learned and applied in the multi-dimensions of leadership: personal, interpersonal, communal, systemic, and ecological (Furman, 2012). Similar to Brown's (2004a) suggestions, Furman (2012) also proposed several strategies by which students of leadership may gain a more thorough appreciation and application of the capacities needed for reflection and action across the multiple dimensions. Examples of this are as follows (Furman, 2012):

- Engaging students of leadership in writing and sharing their cultural autobiographies. (p. 206)
- Structured self-reflection. (p. 206)
- Guided reflection and journaling. (p. 207)
- Role-playing, in which students practice the principles of good listening, dialogue, and cross-cultural communication; to enhance this experience, role-play episodes can be video-taped and analyzed collaboratively with other students. (p. 208)
- Deep listening, dialogue, and cross-cultural communication. (p. 209)

Furman (2012) underscored that the central purpose of these preparation programs ought to be the systematic development in would-be school leaders of these capacities for reflection and action across all the five dimensions stated previously.

**McKenzie and associates model.** McKenzie et al. (2008) also proposed an action-oriented emphasis on the principal preparation program model that was directed towards social justice. They conceptualized their framework around what they saw were the three key goals for

a school leader for social justice: (a) raise academic achievements for all their students, (b) form their students to live as critically engaged citizens, and (c) create a rigorous and responsive curriculum for all pupils in a safe, inclusive, and heterogeneous school environment (McKenzie et al., 2008). In addition to this, they outlined the necessary components for such a leadership preparation program to include proper selection of participants or trainees, relevant curriculum (e.g., knowledge and content) for educating adult learners in various contexts, and a significant induction or praxis period for the leadership students after they graduate from the program (McKenzie et al., 2008).

**Gordon model.** Emphasizing the need to take a developmental approach and a tempered notion of social criticism, Stephen Gordon (2012) proposed a “third way” of preparing school leaders who would promote equity and social justice. He moved beyond the conventional method of preparation programs but also veered away from an absolutist understanding of the critical approach. He cited Kenneth J. Gergen’s (1994) *The Limits of Pure Critique* to argue that unabashed application of any ideology (i.e., critical theory) in an educational leadership preparation program might especially be harmful if they tended to limit themselves to “describing the ideal positions of a debate,” without much effort in “prescribing solutions” (Gordon, 2012, p. 9). Although Gordon (2012) recognized how a critical approach could help bring about awareness of inequity and its ill effects, he strongly recommended instead an alternative and “balanced” model that included the seven interrelated components of (a) awareness, (b) care, (c) critique, (d) expertise, (e) community, (f) accountability, and (g) relationship—with this last element at the core of his model. He also advocated firmly for leadership students to engage in extensive field experiences in various school and community

contexts during their studies as well as participation in internships and induction programs after their formal program (Gordon, 2012). Gordon (2012) believed that universities or institutes which offer such leadership courses or degrees should seriously partner with local schools and districts to monitor and provide ongoing support for their graduates as they go through structured induction programs for the first three years of their educational administrative career.

**Capper, Theoharis, and Sebastian model.** Coleen Capper and her associates, George Theoharis, and James Sebastian (2006) also presented their model of leadership preparation which, as I stated in Chapter 1, formed the basis of a modified conceptual framework in this study.

Capper et al. (2006) proposed a straightforward and comprehensive preparation program that was aimed at developing school leaders for social justice. It was structured with a “horizontal scaffold” that denoted the educational leader’s competency domains of critical consciousness, knowledge, and practical skills, and a “vertical support” that represented the program elements of curriculum, pedagogy, and assessment. Together, these formed nine interrelated domains for their proposed framework for a social justice leadership program (Capper et al., 2006). Figure 4 below is a graphic representation of the Capper et al. (2006) model.

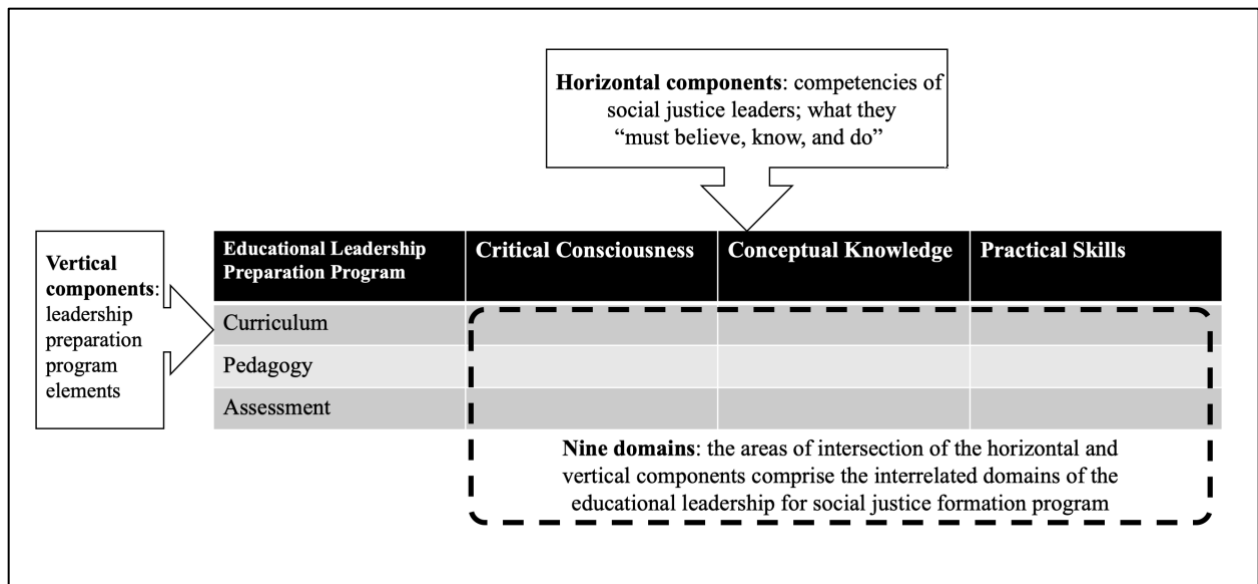


Figure 4. The nine domains of the Capper, Theoharis, and Sebastian’s (2006) conceptual framework. This model highlights the vertical and horizontal components that intersect and create the nine areas in preparing educational leaders for social justice. Adapted from “Toward a Framework for Preparing Leaders for Social Justice,” by C.A. Capper, G. Theoharis, and J. Sebastian, 2006, *Journal of Educational Administration*, 44(3), p. 220. Copyright 2006 by the Emerald Group Publishing Limited. Used with permission.

**Horizontal components.** The horizontal scaffold as Capper et al. (2006) asserted was what social justice leaders “must believe, know, and do” (p. 212). Critical consciousness was the first of these, and Capper et al. (2006) explained it as something that went beyond a superficial disposition but was rather an engrained belief and value system in a leader who wrestled for a greater personal and communal understanding of the nature, complexities, and implications of oppressive power relations, and unjust social constriction (i.e., racism, sexism, and heterosexism; Capper et al., 2006). Knowledge was the second of these horizontal domains. It was the leader’s growing ability to know, understand, and articulate the conceptual intricacies of evidence-based and data-informed practices that build and sustain equitable schools for diverse learners and capable educators (Capper et al., 2006). Practical skill, the third horizontal aspect, was putting critical consciousness and knowledge to meticulous practice in order to promote equitable learning environments, policies and procedures for all students (Capper et al., 2006).

These three interrelated domains were essential to the program. They were the key areas of development for future educational leaders to shift their thinking about organizational structures and leadership functions towards a social justice paradigm that increased their ability for transformative school leadership that sought improved learning and holistic growth for all their students (Capper et al., 2006).

*Vertical components.* Curriculum was the first programmatic element of the three interconnected and intentional vertical supports. It was the specific content area or course of study that reinforced the deepening of critical consciousness, widening of conceptual knowledge, and strengthening of practical skills in leading from a social justice perspective (Capper et al., 2006). The second vertical support was pedagogy or the culturally responsive and student-centered manner by which consciousness, knowledge, and skills were developed within the preparation program (Capper et al., 2006). As Black and Murtadha (2007) had written, social justice leadership preparation programs ought to have its signature pedagogy which is a distinctive form of teaching and learning that prepares future school leaders to be reflective and knowledgeable agents for social change. The third vertical aspect was the multi-level assessment of the leadership student (Capper et al., 2006). It was a mechanism by which the depth and quality of the critical consciousness, conceptual knowledge, and practical skills were assessed and measured against validated standards (Capper et al., 2006).

These horizontal and vertical components came together in intersecting themes that formed the nine domains of the Capper et al. (2006) model. Below is a table (Table 2) that summarizes these domains:

Table 2

*The Nine Domains of the Capper et al. (2006) Framework for Educational Leadership for Social Justice Preparation*

Dimensions	Critical Consciousness	Conceptual Knowledge	Practical Skills
Curriculum	Curriculum on critical consciousness: content that raises student consciousness about power, privilege, and associated issues, for example, white racism, heterosexism, and the ways that schools are typically structured to perpetuate power inequities (p. 214)	Curriculum about knowledge: curriculum focused on specific knowledge about related theories, subject areas such as special education law, and knowledge about evidenced-based practices such as reallocating resources, second language acquisition, reading and math curriculums (p. 214)	Curriculum about skills: content that pertains to how to actually implement evidenced-based practices or putting particular knowledge into practice to work toward erasing inequities in schools (p. 215)
Pedagogy	Pedagogy related to critical consciousness: describes information about teaching methods for raising student consciousness about power inequities (p. 216)	Pedagogy related to knowledge: describes teaching strategies to help students learn about evidence-based practices or related subjects and theories (p. 217)	Pedagogy related to skills describes teaching strategies to help students learn the skills that are necessary to lead socially just schools (i.e., Internships, or role-playing verbal responses to critical questions from parents and other community members, etc. (p. 217)
Assessment	[Measuring] how the dispositions of students in a leadership program about social justice changed as a result of taking a course on leadership and social justice (p. 217)	N.B. Capper et al. (2006) could not locate any literature that assessed leadership knowledge and skills related to social justice (p. 217)	

*Note:* As summarized from “Toward a Framework for Preparing Leaders for Social Justice,” by C.A. Capper, G. Theoharis, and J. Sebastian, 2006, *Journal of Educational Administration*, 44(3), pp. 209-224. Copyright 2006 by the Emerald Group Publishing Limited all rights reserved. Used with permission.

**Program Content, Delivery, and Evaluation**

After having been acquainted with the research-based standards of leadership preparation as well as the various models of preparation programs geared towards social justice in schools, I shall now present several studies that recommend various applicable curriculum, pedagogy, and



assessment tools or processes in forming educational leaders for social justice. It is imperative to note, however, that these are not the only possible manner of educating leaders. As Cambron-McCabe and McCarthy (2005) rightfully emphasized, focusing too much on what works well according to popular conventions (and researches) can suppress creative conversations and limit the task to a simple identification of specific abilities and erudition that potential administrators must demonstrate adequately. Thus, a greater aim ought to be an ongoing search for what works in various contexts for school leaders to engage in challenging responsibilities that usually demand a transformation of ethics, mindsets, and behaviors within the school community to constantly and consistently address fundamental social justice concerns (Cambron-McCabe & McCarthy, 2005). In a way, it is allowing leadership students to come out of the programs with the disposition, skills, and language that would allow them to ask difficult questions, challenge oppressive notions of authority, power, privilege, and traditions, and thus, collaborate with others for a more equitable, student-centered, learning institutions (Cambron-McCabe & McCarthy, 2005).

**Content.** In order for educational leadership programs to encourage their students to take-on a social justice paradigm, leadership scholars have shown a need for them to first understand and practice critical consciousness (Brown, 2004a; Cambron-McCabe & McCarthy, 2005; Capper et al., 2006; Furman, 2012; Hernandez & McKenzie, 2010; McKenzie et al., 2008; McKenzie & Scheurich, 2004). Citing the writing of McKenzie and Scheurich (2004), Cambron-McCabe and McCarthy (2005) emphasized the value of “*practiced reflexivity*, where individuals consciously take responsibility for their actions—recognizing that all actions have an impact on the community” (pp. 214–215). Brown (2004a) also insisted upon a candid retelling of the

history of schooling (e.g., in the US) and honestly recognize and even admit one's participation in the "systematic nature of inequities reproduced daily" (p. 93).

This becomes all the more relevant when such reflections are structured within the broad content areas of the multiple and complex dimensions of school leadership that thoughtfully identifies and actively tackles institutional and societal inequities brought about by racism, gender inequalities, sexual orientation, and disability (Cambron-McCabe & McCarthy, 2005).

Seamlessly incorporating critical consciousness development as an objective in the curriculum can assist aspiring school leaders to confront institutional practices that usually go unchecked and continue to favor certain groups while marginalizing others (Hernandez & McKenzie, 2010; McKenzie et al., 2008). Thus, Hernandez and McKenzie (2010) recommended a leadership preparation program curriculum that required their participants to engage in readings and research that have social justice as their explicit focus. McKenzie et al. (2008) also suggested that these programs could deepen the leadership students' understanding of instructional leadership that went beyond supervision, staff development, and curriculum and instruction but included a broad comprehension of strategies for inclusive and higher learning for all students.

Pounder et al. (2002) also had a similar recommendation regarding a curriculum that strengthened the future administrators' foundational knowledge (i.e., conceptual or theoretical and experiential) that were intricately connected to promoting a multifaceted comprehension of socially just principles in teaching, learning, policy formulation and implementation, organizational and fiscal management, and professional development. In acquiring a firm and integrated knowledge on these content areas, Pounder et al. (2002) affirmed that leadership

programs could be relevant tools in enabling future school leaders to detect and correct notions, practices, and processes that were detrimental to upholding “high expectations for all children and faculty; a curriculum that is rigorous, multicultural, and inclusive; learning environments that frame and support individual learners; a learning-focused and inclusive community; and widespread commitment to unqualified equity” (p. 274).

Other scholars recommended specific social justice topics that can purposely be incorporated into the leadership program at various points but must be intentionally nurtured and developed all throughout the duration of the program (Capper et al., 2006). Some of these important themes are race and racism (Young & Laible, 2000), special education and language acquisition (Theoharis, 2009), implementing change through funding and policy (Frattura & Capper, 2007) and disability studies (Cambron-McCabe & McCarthy, 2005; Theoharis, 2009).

Translating critical consciousness and knowledge to practical skills must also be an integral part of the curriculum (Capper et al., 2006). As Pounder et al. (2002) highlighted, leadership formation does not stop at training future administrators to identify, examine, and criticize problematic systems and structures. School-leaders-in-training must be prepared to competently plan and strategize in order to make the right decisions to solve existing problems and imagine better ways of educating students. As such, leaders for social justice must also learn, in these programs, how to counteract varied socio-political and cultural elements that undercut equity while creating conditions that reinforce inclusion, equality, and holistic development (Pounder et al., 2002; Theoharis, 2009).

Developing practical skills in teacher hiring, evaluation, and supervision that have implications on the equitable learning of students are also a vital part of the social justice

curriculum (McKenzie et al., 2008). Likewise, these courses should have components that train leaders to engage their faculty in designing programs and content for their students (i.e., K–12 pupils) in critical consciousness and responsible citizenship (McKenzie et al., 2008). McKenzie and Scheurich (2004) suggested as well that aspiring school leaders need to acquire skills that would enable them to effectively influence and encourage their faculty and staff to have a paradigmatic shift that focuses squarely on the welfare of their students:

[School personnel must] reframe their thinking about students, families, and communities and, thus, move their thinking from a deficit orientation to an assets-based, one that recognizes what Moll, Amanti, Neff, and Gonzalez (1992) called the “funds of knowledge” that students bring with them to school. (p. 609)

What might be helpful in this endeavor is the recommendation of Skrla, Scheurich, Garcia, and Nolly (2004) who also proposed that leadership students learn the valuable tool of equity audits that expose, identify, and address inequities present in the three areas of an educational institution: teacher quality, educational programs, and student achievement.

Good facilitation and communication skills must also be taught in preparation programs for educational leadership for social justice (Capper et al., 2006). Carolyn Shields (2004, 2010) asserted that transformational leaders need skills in guiding the school community to dialogues that constructively engage all on critical issues surrounding social inequities. Indeed, for Shields (2004), transformative leaders should not remain silent and passive in the face of injustice, they must “engage in dialogue, examine current practice, and create pedagogical conversations and communities that critically build on, and do not devalue, students’ lived experiences” (p. 128).

Theoharis (2007, 2009, 2010) argued as well that effective school leaders with a social justice perspective must have the practical skills in building and supporting structures that

encourage data-informed, collaborative decision-making practices within a “climate of belonging” that upholds the schools’ positive values and culture.

**Delivery.** A number of researchers have shown that rigorous pedagogical practices that supported problem-posing instruction and reflective inquiry-based praxis were effective methods of enriching critical consciousness among future school leaders (Black & Murtadha, 2007; Chubbuck, 2007; Pounder et al., 2002). This pedagogy is foundational to the techniques of instruction that students of leadership must receive throughout the duration of the preparation programs (Capper et al., 2006).

For a programmatic and intentional manner of learning, students of leadership need to acquire and deepen their social justice-focused analytical skills, knowledge, and dispositions through a myriad of ways that follow the reflection-action dynamics (Brown, 2004a; Furman, 2012). Among the recommendations of Pounder et al. (2002) were participation in field-based inquiries that were attentive to issues of discrimination and subjugation, critical examination of stereotypes that are related to oppression (i.e., colonization), facilitating a collaborative effort to design a rigorous and inclusive school curriculum, and analyzing empirical data regarding racism in school systems.

Likewise, Brown (2004b) also suggested various adult-learning strategies that heightened the leadership students’ consciousness on injustice on multiple levels through activist-centered assignments such as volunteering and participating in grass-roots action-research, social action service centers, and community foundations that have social justice advocacies. Similar to these were neighborhood walks, as recommended by McKenzie and Scheurich (2004), or educational plunges (Brown, 2004b), that creatively immersed future leaders in their students’ contexts (e.g.,

spending time in their communities and getting to know their families, seeing their needs, and appreciating their aspirations).

McKenzie and Scheurich (2004) further identified other pedagogical strategies that educational leadership programs may employ in order to build on the leadership students' skills in leading equitable schools. Examples of this were developing skills to honor divergent perspectives in class as an explicit norm in the classroom, keeping reflective journals, and partnering with other teachers or administrators who foster and advocate for social justice in their schools (McKenzie & Scheurich, 2004).

**Evaluation.** In order to validate the effectiveness of an educational leadership for social justice preparation program, there must be a purposeful assessment of the leadership students' growth in the various dimensions of consciousness, knowledge, and skills (Capper et al., 2006).

*Assessing critical consciousness development.* Allen, Harper, and Koschoreck (2017) indicated that changes in dispositions of pre-service school principal candidates or leadership program students can be measured through survey instruments, modeling, embedded coursework, and reflective activities. Progress may also be observed through introspective capstone projects that may include the following:

- A summary of the coursework that the student has taken.
- A professional resume.
- A copy of their dispositions index and standards rating from the assessments.
- Artifacts including papers, projects, and reflections that represent each ISLLC (now PSEL) standard.

- Personal and professional reflections focused upon each standard. (Surface, Smith, Keiser, & Hayes, 2012, p. 121)

Surface, Smith, Keiser, and Hayes (2012) were interested at looking at how the perceptions of the leadership students and graduates of a master's in educational administration program demonstrated alignment with their skills and dispositions that were necessary to lead ethnically diverse schools. The researchers were able to demonstrate through standards and disposition inventories/surveys given to the participants before and after they completed the degree that the post-test means were significantly higher than pretest means, enabling them to determine that the “educational administration candidates espoused more positive diversity dispositions after completing the program” (Surface et al., 2012, p. 124).

*Assessing growth in leadership knowledge and skills.* Basing it from the scant literature available on the topic, assessing the leadership students' progress in social justice leadership knowledge and skills has been difficult, even problematic (Capper et al., 2006). It was only recently when Orr, Hollingworth, and Cook (2018) recommended that a way to effectively do so was through performance assessments. Researchers from the Educational Testing Service, Davey et al. (2015), described performance assessments as requiring the following key components:

- Output or performances that are generated from complex, real-world tasks. (p. 19)
- Responses that employ multipart knowledge, skills, and reasoning applicable to real-world scenarios or tasks of the test-taker. (p. 20)
- Multilevel rubrics or scoring criteria such as accuracy, completeness, effectiveness, and justifiability. (p. 21)
- Fidelity to a real-world context that is relevant to the test-taker. (p. 21)

- The interconnectedness of the tasks within the assessment, such as connectedness among the assessment activities and requirements for responding to those activities.

(p. 22)

Thus, through carefully crafted performance tasks that are specific to the leadership program contexts, it becomes possible to have an authentic and direct assessment of the skills and knowledge that are necessary in performing complex responsibilities in the school setting (e.g., collaborative creation of a data-informed school mission and vision statements) that produce positive outcome (Orr, Hollingworth, & Cook, 2018).

### **Successes and Challenges in Attaining Preparation Program Goals**

There have also been a few studies that specifically addressed the effectiveness of preparation programs for educational leadership for social justice. Some of these researches have supported the assertion that existing preparation programs have helped change the beliefs of students by equipping them with specific knowledge and skills to be more effective and transformative leaders in their institutions (Allen et al., 2017; Huchting & Bickett, 2013). There are other studies, however, that bring to light the need for greater rigor in the academic training and assessment of the leadership students (Black & Murtadha, 2007; Levine, 2005).

**Evidence of successes.** As mentioned earlier, the research conducted by Allen et al. (2017) showed that those students, who had undergone an online course for just a little more than a month on social justice leadership, demonstrated an evident growth in their disposition. The students manifested a positive shift in their desire to place the good of others above theirs (Allen et al., 2017). The students also showed a greater appreciation of diversity, as some of the respondents' sense of complacency about racial issues has been superseded by a commitment to



“face prejudices and promote a more positive school culture by promoting a sense of community” (Allen et al., 2017, p. 42). Corollary to this was a greater sense of responsibility to use resources in meeting the diverse needs of all types of students and a stronger notion of duty to “develop relationships with students in order to create a school culture that is safe and supportive for all” (Allen et al., 2017, p. 43). Also, with a more robust and purposeful emphasis to student learning, the participants in the preparation program showed a connection of an awareness of social justice issues related to student learning to developing a critical consciousness necessary for them as future school leaders to advocate for sustainable social change in their schools (Allen et al., 2017).

A two-year qualitative study conducted by Huchting and Bickett (2013) also showed similar successful results. They interviewed graduates of a Jesuit university doctoral program for educational leadership for social justice in order to verify if they were able to apply in their work their school’s program learning outcomes to “respect, advocate, and lead” (Huchting & Bickett, 2013, p. 36). In order to validate the graduates’ responses, their colleagues and supervisors at work were also interviewed (Huchting & Bickett, 2013).

The responses from their interviews showed that the majority of the respondents indicated that there were noticeable positive outcomes as a result of the doctoral program geared specifically on social justice in school leadership (Huchting & Bickett, 2013). Some of these affirmative responses pertained to a deepening of awareness and acknowledgment of the impact of privilege in education and apprehending the deficit model and meritocratic system as operative in schools (Huchting & Bickett, 2013). Most of the respondents also indicated how “the program assisted with their ability to put theory into practice in their daily work (i.e., re-

examining their practice, curriculum formation, admissions procedures, discipline efforts, or relationships with parents and families)” (Huchting & Bickett, 2013, p. 33). Lastly, Huchting and Bickett (2013) observed that the graduates showed a fuller appreciation of cultural and social capital in their leadership role to oppose the unjust status quo and advocate for sustainable social change.

**Areas of growth and challenges.** On the other hand, Arthur Levine (2005) a former president and professor of education at Teachers College in Columbia University gave a scathing critique of the quality of educational leadership programs in the US. He noted that a number of the programs he reviewed seemed to lack clear objectives and curricular rigor and coherence needed by principals and superintendents in their actual performance of their responsibilities (Levine, 2005). For him, most of these preparation programs were easily contented with “helping students meet the minimum certification requirements with the least amount of effort, using the fewest university resources” (Levine, 2005, p. 3). Levine (2005) also lamented what he saw as low admission and graduation standards and weak faculty pool which relied too much on adjunct professors with limited expertise in the “academic content [that] they are supposed to teach, and their dominant mode of instruction is the telling of war stories—personal anecdotes from their careers as school administrators” (Levine, 2005, p. 4).

Echoing Levine’s (2005) rebuke of failed preparation programs for educational leaders, Black and Murtadha (2007) also agonized over a number of these programs’ lack of systematic assessment and development. They posed a challenge in the form of a question to the proponents of educational leadership programs:

Programs have little evidence from which to respond to questions about program accountability; for example, does a particular program make a difference in leadership

behavior, organizational change, student achievement, or social justice/equity oriented leadership? (Black & Murtadha, 2007, p. 5)

These areas of improvement identified by Black and Murtadha (2007) and Levine (2005) must be taken seriously especially if such programs are appropriated in various educational contexts, including those that prepare future priests for possible educational leadership positions.

### **Incorporating Catholic and Jesuit Dimensions to Leadership Programs**

As mentioned in an earlier section, a formation gap for the intentional preparation of the clergy to take on leadership responsibilities in Catholic schools exists within seminary programs (Boyle, 2010; Boyle & Dosen, 2017). Nonetheless, there are a few Church documents and several Catholic leadership studies that provide possibilities of incorporating educational leadership preparation programs in seminaries within the purview of spirituality and mission-oriented pastoral paradigms.

**The spiritual perspective.** Admittedly most of the Catholic Church documents veer away from an explicit referencing of priests as professional leaders and instead speak of them as pastors or shepherds (Fischer, 2010). The Catholic Church has viewed the formation of her priests to be a gradual ontological integration of Christ's identity and mission (John Paul II, 1992) and not merely a practical instruction on how to influence followers to accomplish an organizational task, as leadership connotes in the secular sense (Tannenbaum, Weschler, & Massarik, 1961). More than influencing others, therefore, priestly leadership participates in Christ's work of gathering God's people and calling for the Holy Spirit's gifts in them, for them to likewise participate in the life and mission of Christ in the world (Fischer-Lescano, 2012; John Paul II, 1992). As such, Fischer (2010) noted that the Church may sometimes refer to priests as

“leaders,” although in a somewhat restrained manner, as in the case of the Vatican II decree on the Ministry and Life of Priests:

Priests exercise the function of Christ as Pastor and Head in proportion to their share of authority. In the name of the bishop they gather the family of God as a brotherhood endowed with the spirit of unity and lead it in Christ through the Spirit to God the Father. (Second Vatican Council, 1996b, p. 872)

This spiritual perspective, however, does not negate the value of preparing seminarians for their future pastoral leadership roles, but merely places it in its Christian significance as informed by authentic Gospel values (Fischer, 2010). St. Ignatius of Loyola, himself, though not acquainted with today’s leadership jargons (i.e., transformational leadership, empowerment, organizational culture, professional learning communities, etc.), seemed to have a deep, albeit, implicit appreciation of what leadership meant for the Society of Jesus and its works (Coghlan, 2005; Darmanin, 2005).

**The Ignatian mission-oriented vision.** A former President of the Conference of European Jesuit Provincials, Fr. Alfred Darmanin, S.J. (2005) was struck by St. Ignatius’ vision as a leader. To Darmanin (2005), this was manifested in the Founder’s writing of the order’s constitutions that referred to the “mission” as a primary criterion for the Society of Jesus’ apostolic discernment, governance, and formation. It was not surprising then that even though formal seminary training in the Church was not yet fully in place, St. Ignatius, already dedicated substantial sections in the Jesuit Constitutions on how scholastics are to be formed and prepared not just for sacramental priesthood but for the varied ministries in which the Jesuits are engaged (Darmanin, 2005).

This formation vision of St. Ignatius has been articulated in various ways over the centuries. One of the clearest iterations of his vision of formation regarding leadership

preparation of Jesuits came from the U.S. Jesuit Task Force on Formation and Leadership (2009) which affirmed that “a well-developed program of formation for leadership and governance is not only essential for the successful formation of ours (members of the Society of Jesus) toward a healthy religious lifestyle, but is critical for the future of our apostolic mission and Jesuit identity” (p. 52).

**Leadership standards in Jesuit schools.** In a specific way, American educator Fr. Joseph F. O’Connell, S.J. (2007) had already seen a need for this set of standards among the leaders (Jesuit and lay alike) in Jesuit schools across the US and thus, had collaborated with various Jesuit school board chairs, presidents, principals and members of the Commission of Assistants to the Provincials for Education (CAPE) to develop and publish the workbook, *Ignatian Leadership in Jesuit Schools: Resources for Reflection and Evaluation*. Knowing that most of the Jesuit secondary schools in America (and elsewhere, including those in the Philippines) follow a president-principal model (i.e., the school president/director is almost always a Jesuit and the principal a lay person), he dedicated a section to list the “Qualities for a President of a Jesuit Secondary School” not just as a way to delineate responsibilities but to define more clearly what leadership means for the school head (O’Connell, 2007, p. 58). This listing was based on the qualifications earlier set by the International Commission on the Apostolate of Jesuit Education (1986) which outlined the leadership function of a school president or director as follows:

The role of the director is that of an apostolic leader. The role is vital in providing inspiration, in the development of a common vision and in preserving unity within the educational community. Since the world-view of Ignatius is the basis on which a common vision is built, the director is guided by this world-view and is the one responsible for ensuring that opportunities are provided through which the other members of the community can come to a greater understanding of this world-view and its

applications to education. In addition to this role of inspiration, the director remains ultimately responsible for the execution of the basic educational policy of the school and for the distinctively Jesuit nature of this education. (p. 333)

O'Connell (2007) operationalized this by enumerating six main qualities recognized as essential in a Jesuit school president:

- *An authentic role model*: someone who shows “professional and personal commitment to the Gospel values and manifests sound educational value, compassion, and pastoral sense.” (p. 58)
- *Embodies spiritual commitment*: someone who “accepts the Church’s mission and serves as the animator of what is Jesuit and Catholic in the school. (p. 58)
- *An apostolic leader*: someone who has proven ability to communicate the Jesuit educational vision to broad and diverse publics.” (p. 58)
- *An efficient and effective manager*: someone who “understands the administrative and financial processes, works in building a team, and generates and manages resources.” (p. 60)
- *A keeper of tradition*: someone who is “committed to the Jesuit sponsorship of the school and is accountable to the leadership of the Society of Jesus and the Board of Trustees.” (p. 60)
- *Possesses educational experience*: someone who “has Jesuit education experience and meets professional standards acceptable to the academic community.” (p. 60)

### **Conclusion**

The value of the education apostolate of the Society of Jesus from its early stages up to this day is apparent. This ministry aims at providing quality Catholic education for all their

students. Like in all other schools that aspire to be vehicles for inclusive learning and social change, school leadership is crucial even in small parochial schools. Catholic seminaries, by tradition, have not focused on such specific training and yet some of their alumni are assigned to lead mission schools. Preparing future priests who are competent educational leaders with a social justice perspective becomes all the more imperative. Various leadership preparation designs and models can be helpful in this regard.

## **CHAPTER 3**

### **METHODOLOGY**

#### **Introduction and Organization of the Chapter**

Following a comprehensive review of the literature, I will focus, in this third chapter, on the research design and methodology. After a brief restatement of the research questions and a discussion about the rationale for a phenomenological design, I will present (a) the choice of participants, (b) the setting of the study, and (c) the manner of collecting, presenting, and “analyzing” data in this research. Finally, I will make a concise exposition of the study’s limitations and ethical considerations and how I addressed them.

#### **Restating the Purpose of the Study**

The purpose of this study was to explore the leadership experiences of Jesuit educational leaders who had been assigned as first-time school directors in mission schools in the Southern Philippines a few years or immediately after their ordination to the priesthood. The study also attempted to appreciate, their perceptions of the kind of educational leadership formation that they received in the seminary before this specific apostolic assignment. The end goal of this study was to identify the implications of the participants’ lived experiences vis-à-vis the kind of educational leadership training needed in the Jesuit scholasticate and thus, suggest changes to adequately prepare future priests to lead mission schools from a social justice standpoint.

#### **Research Questions**

In order to describe the lived experiences of newly ordained Jesuits serving as first-time school directors in mission schools and understand how they appreciated the leadership



preparation that they received prior to their assignment, I sought responses to the following research questions:

- What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?
- What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders?

### **Rationale for a Qualitative Phenomenological Approach**

The study followed a qualitative phenomenological research design (Cohen, Manion, & Morrison, 2018; Denscombe, 2014; Gay, Mills, & Airasian, 2012; Groenwald, 2004; Hycner, 1985; Kafle, 2011). I collected information to describe the newly ordained Filipino Jesuits' unique lived leadership experiences in mission schools and their thoughts on what aspects of their seminary formation helped them lead in the context of rural schools for economically and culturally marginalized students in the Southern Philippines.

### **A Venue to Listen and Learn**

The qualitative design of this research served as a platform for the participants to amplify their voice and tell their stories while contemplating the implications of their experiences to the formation program of future Jesuit school leaders. The chosen sample of school directors articulated their stories through personal disclosures and reflections which were crucial in understanding and valuing their manner of leadership stance (i.e., consciousness/disposition), planning (i.e., conceptual knowledge), and acting (i.e., practical skills). Through their recounting

of events, sentiments, and insights, the phenomenological approach to this study was helpful in weaving together anecdotal accounts and subsequently, appreciating a complex social phenomenon that would have otherwise gone “un-reflected” upon if not totally ignored in day to day living (Denscombe, 2014; Groenwald, 2004). To be sure, the focus was not simply on the selected participants themselves and their unique contexts as such, as this was not a case study, but rather on the rich meaning that was uncovered and drawn from their interrelated experiences (Eddles-Hirsch, 2015).

### **Ignatian and Humanist Compatibility**

Built into a phenomenological study is the profound reverence for the participants, their experiences, and their insights (Denscombe, 2014). Denscombe (2014) wrote about this as the phenomenological research design’s inherent humanistic quality:

It carries an aura of humanism and, in its efforts to base its enquiry on the lived experiences of people in the everyday world, it represents a style of research that is far removed from any high-minded, abstract theorizing. In effect, the researcher needs to be close to the objects of study. (p. 103)

This humanist hermeneutics, too, is in consonance with the Ignatian character embedded in a transformative research (Coghlan, 2005). In a sense, the Ignatian principles that value the intimate relation between experiences (action) and reflection complement the tenets of a phenomenological study and may even contribute a faith-based transformational methodology to the field of educational research (Coghlan, 2005). These aspects were particularly important in this study, given that the participants were all Jesuits and the phenomenon in focus was directly related to their Jesuit mission and formation.

## **Appropriateness**

The phenomenological approach was also suitable to my research because of this method's aptness to small-scale studies that rely on several in-depth interviews and detailed observations. With the specificity of the research site and other logistical constraints, a focused phenomenological approach was also a practical choice for a research design (Denscombe, 2014; Groenwald, 2004).

## **Research Setting**

In order to safeguard confidentiality, I used pseudonyms instead of the names of the actual places and participants.

The general research location was in the Southern Philippines. In this locality, the Jesuits have set up a mission district which would be designated in this study as the Southern Philippine Mission District or SPMD (see Appendix A for the SPMD Map). I conducted the gathering of data for this study (i.e., questionnaire, interviews, and observations) from mid-April until the end of June 2019. This period covered the tail-end of school year 2018-2019 and the beginning of the school term for 2019-2020. It must be noted that the academic year in most parts of the Philippines would begin on the first Monday of June and runs for at least 200 class days. Administrators would usually schedule pre-service and in-service faculty training, bridging programs for new students, and meetings with parents in the months of April and May, most especially during the weeks leading to the opening of classes. Thus, although my research period was hectic for the participants, this was also one of the best times to observe them at work.

## **Southern Philippine Mission District (SPMD)**

The SPMD was located within a local Roman Catholic diocese that spanned a mountainous area of 8,293 square kilometers (Catholic Bishops Conference of the Philippines, 2008). Within this area, an estimated 61.3% of its population or close to 800,000 locals identified themselves as Catholics (Catholic Bishops Conference of the Philippines, 2008). This diocese was part of a province that had one of the highest incidences of poverty among Filipino families, with 53.6% of its household population living below the poverty threshold (Jesuit Philippine Province, 2016a; Philippine Statistics Authority, 2017). Employment came mostly from agriculture. Farm productivity, however, had been suffering due to the over-exploitation of resources and extreme weather conditions in the past years (Jesuit Philippine Province, 2016a).

The SPMD was also home to some members of the Indigenous Peoples communities (IPs or *Lumad*). Although no one had systematically collected a census within the Jesuit mission district, a separate study had recorded that within the main island of Mindanao in which SPMD is located, there are 18 to 27 tribes from indigenous cultural minorities, totaling to more than seven million individuals (Jesuit Philippine Province, 2016a).

### **SPMD Mission High Schools**

Based on the 2019 catalogue of the Jesuits in the Philippines (Jesuit Philippine Province, 2019), there were four Jesuit mission stations in SPMD; three of which had Jesuit parishes, and all four areas had mission high schools. At the beginning of this research, there were seven Filipino Jesuit priests assigned in the whole district (Jesuit Philippine Province, 2019). One of them was the local superior governing the whole mission district and leading six of his confreres

(Jesuit Philippine Province, 2019). Among the six Jesuits, four were missioned as school directors or presidents of mission high schools (Jesuit Philippine Province, 2019).

**Staffing.** In this study, I visited four mission high schools in the SPMD. Each school had a Jesuit serving as a first-time school director or president. In every mission high school, religious sisters from local congregations assisted the Jesuits in their administrative roles. Only two of the schools had religious sisters as their principals, and the other two had women lay principals who had been in their posts for at least five years. All four schools, however, had religious sisters as their finance officers.

The faculty were composed mainly of the laity who lived within the respective school's locality. A mission high school had 14 to 33 lay teachers, depending on the student population of the school (Jesuit Philippine Province, 2018). Not all of the teaching staff had teaching credentials from the Philippine Regulatory Commission (PRC). Based on the statistics provided by the schools for the school year 2018-2019, only 57 out of their 87 lay faculty (65.51%) had the government-approved teaching licenses. On the average, a mission high school teacher's monthly wage (PhP9,650.00) was less than half of the starting-level, public school teacher's gross basic monthly salary of PhP 20,179.00 (Aning, 2018).

**Students.** In the school year 2017-2018, the four mission high schools had a total 2,632 enrolled students from grades seven to 12 (Junior and Senior High Schools). There was a slight increase in the number of pupils for school year 2018-2019, with a total number of 2,659 students. The percentage of the student population who identified themselves as belonging to the Indigenous Peoples (IP) communities ranged from 14% to 93% depending on the location of the school. Over-all, 854 students out of the total enrollees of school year 2018-2019 identified

themselves as *Lumad*. Two thousand three hundred twelve students received government subsidies or vouchers to support their studies during the school year 2018-2019. This number was about 86.94% of the entire student population of the SPMD mission schools. Other students received additional support from private benefactors, including those funds raised by the Jesuits in their respective parishes. The exact number of recipients was not readily available during the data gathering phase.

**IP student residences.** There were special dormitories in three of the four mission high schools to accommodate the unique needs of some of their IP students who came from remote villages. In these dormitories, the respective parishes would provide for the schooling needs (e.g., board and lodging, uniforms, school supplies, and tutorials) of the *Lumad* students. Although the student residences were also venues for Christian and social formation for the students, proselytizing was not an actual goal in these school communities. The primary aim was to support the disadvantaged IP students so that they would have opportunities to succeed in their secondary studies while sustaining their cultural heritage. Usually, lay volunteers who reported directly to the Jesuit school directors took charge of the IP student residences.

**Prescribed general curriculum.** All four schools would undergo regular accreditation from the Department of Education (DepEd). They followed the DepEd prescribed curriculum and added some Christian values formation courses for their students. One of the four schools had a special agricultural-vocational senior high school track. Another school used to have a post-secondary education agricultural-vocational department that provided free horticulture and farm-animal raising certification programs that were also accredited by the government. In 2016, this specific school discontinued the programs due to insufficiency of funds and qualified

faculty. None of the schools had a structured curricular program for their IP students, but according to their mid-term strategic plan (as seen in the minutes of their Board Meetings), the mission high schools would begin the process of an improved academic program that would include the gradual “Curricularization” of some IP knowledge (i.e., literature), skills (i.e., traditional crafts), and practices (i.e., cultural leadership values) in the next five years.

Table 3 gives a summary of pertinent statistics about the four mission high schools within the Southern Philippine Mission District (SPMD) as of academic year 2018-2019.

Table 3  
*General School Profiles of Mission High Schools in SPMD as of Academic Year 2018-2019*

	St. Mark's in Azpatia Town			St. Rita's in Pamplona Town			St. Dominic's in Manresa Village			St. Francis' in Barcelona Village		
Jesuits Assigned	1			1			1			1		
Lay Faculty	18			17			33			14		
Licensed Teachers	8			7			22			10		
Starting Monthly Salary of a Licensed Teacher	PhP9,250.00 (USD176.76)			PhP9,250.00 (USD176.76)			PhP9,350.00 (USD178.67)			PhP10,750.00 (USD205.51)		
Student Population	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
	243	292	535	248	290	538	512	590	1,102	247	237	484
IP or Lumad Students	73 (14%)			499 (93%)			152 (14%)			132 (27%)		
Recipients of Gov't Subsidies/ vouchers	517 (97%)			437 (81%)			987 (90%)			371 (77%)		
Licensed Teacher to Student Ratio	1:67			1:77			1:50			1:48		

### Choice of Research Participants

In this study, I employed a purposive sampling of participants. This sampling method is most applicable when the researcher is exceptionally knowledgeable about the context and characteristics of the specific persons who are deliberately chosen to acquire the most relevant and useful information in responding to the research questions (Denscombe, 2014).

## **Purposive Sampling**

As the researcher, I needed to have “special knowledge or expertise about some group to select subjects who represent this population” (Lune & Berg, 2017, p. 39). My choice of participants was mainly due to my thorough consideration of the phenomenon familiar to me as an “insider.” The purposeful choice of selecting the participants was integral to responding to the specific questions that I wanted to answer in this phenomenological study (Denscombe, 2014; Eddles-Hirsch, 2015). As Hycner (1985) pointed out, “part of the ‘control’ and rigor emerges from the type of participants chosen and their ability to fully describe the experience being researched” (p. 294).

**Seven participants.** Using my discretion and knowledge of the mission district and the pool of possible participants, I initially handpicked eight Jesuit priests for this study. Only seven ( $N = 7$ ) of them, however, agreed to be part of the study. I knew all the participants personally and had interacted with them during our formation years in the seminary. I had also worked with a good number of them when I was assigned as a missionary in the SPMD from 2014 to 2017.

They were of varying age and came from diverse educational and professional backgrounds before they entered the Society of Jesus. Other than being school heads during their terms, they also held concurrent positions and responsibilities. Some of them were parish priests and others also assumed significant positions outside the mission district. They all received a mandate from the Jesuit provincial superior to serve as school heads in their respective mission high schools for an indeterminate number of years.

**Current and past school directors.** Because I arrived at the SPMD for data gathering at a time that the participants were in transition for the coming year’s Jesuit missioning from the



provincial superior, one participant was leaving after two years of service, and the other two were coming back to the mission district after taking on a different assignment outside the mission district for several years. Four ( $n = 4$ ) of the participants were current or out-going school directors or presidents (during academic year 2018-2019). The other three participants ( $n = 3$ ) were previous school directors or presidents assigned in the SPMD mission high schools for at least a school year (before academic year 2018-2019). I limited my choice of past school directors to those who had just finished their term within the last five years since school year 2018-2019. I presumed that those who had just finished their leadership assignments during this period would have a better recollection of their experiences in leading the mission schools than any of the other past school directors who had been away from the mission district for a much longer time.

All the participants were capable of expressing and narrating their experiences in English and agreed to be recorded in taped interviews. I also requested and secured informed consent from all the participants in order for me to proceed with the study and gather pertinent information (i.e., school documents) which I analyzed and reported in this study.

### **Data Collection**

I used various means of collecting data for this research. I began by distributing a pre-interview questionnaire to the participants. Their responses to this served as a springboard for my in-depth, semi-structured, face-to-face interviews with them. After which, I also conducted a focus group discussion (FGD) among four of the participants. To further substantiate and corroborate what had been shared in the conversations, I also carried out on-site participant observations and examined some pertinent mission high school and Jesuit formation documents.

## **Pre-interview Questionnaire**

To gather sufficient background information about the participants' leadership formation and the specific context of their educational administration experiences in their current or previous school assignment, I requested them to complete a pre-interview questionnaire through Google Forms (<https://www.google.com/forms/about/>).

In designing this questionnaire, I generally followed the steps suggested by Cohen, Manion, and Morrison (2018) who emphasized the need to have a clear purpose for the questionnaire that was responsive to the research questions of the study and inclusive of all the integral issues that can be addressed by the respondents in a forthright manner. Besides basic questions that sought demographic information, the questionnaire also included a few open-ended queries in order to place the “responsibility for, and ownership of, the data much more firmly into [the] respondents' hands” (Cohen et al., 2018, p. 475).

I administered the online pre-interview questionnaire about three weeks prior to my one-on-one interview with the participants. I had previously conducted a pilot test to refine the questionnaire and make it more “user-friendly” to the respondents. A sample of the pre-interview questionnaire is provided in Appendix B.

## **Interviews: Semi-structured Individual Interviews and Focus Group Discussion**

Denscombe (2014) stated that, as a method of data collection, interviews utilize the participants' responses to the researcher's questions as the chief source of information, similar to the process of data gathering through questionnaires. The main difference is that through interviews, there is a better appreciation of the complex and subtle phenomenon being studied. Rather than just obtaining very brief reports about a particular situation, interviews can lead to

in-depth exposition of the participants' nuanced emotions, perceptions, and opinions on multifaceted concerns (Denscombe, 2014). Aside from obtaining rich and detailed information about complex issues, interviews are helpful as well in gaining privileged information, "where the opportunity arises to speak with key players in the field who can give particularly valuable insights and wisdom based on their experience or position" (Denscombe, 2014, p. 175). In this study, I used two forms of interviews: semi-structured individual interviews and a group interview through a focus group discussion.

**Semi-structured individual interviews.** After obtaining some preliminary data through the pre-interview questionnaire, I proceeded with a face-to-face, semi-structured interview of each of the participants.

Ayres (2012) described a semi-structured interview as a useful qualitative data gathering instrument in which a researcher directly asked participants a sequence of preset queries or prompts without requiring a fixed range of answers to each question. Nonetheless it was important to set the agenda or provide a frame of reference for the participants' responses, not so much to limit the content and manner of responses, but simply to have a basis for organizing and analyzing the participants' responses in the effort to ultimately answer the research questions of the study (Cohen et al., 2018). As such, I prepared a semi-structured interview protocol to guide me (see Appendix C for the interview protocol).

Given this study's phenomenological design, it was important for me to remember that even as I had developed a written interview protocol in advance, I was ready with a variety of probes that drew deeper reflection and encouraged connection with the participants through my active listening (Ayres, 2012). An example of which was to ask, "Can you share more about how

that (e.g., experience) was like for you?” or by giving a summary statement after a participant’s long response in order to confirm with the interviewee if I had understood his narration correctly (Ayres, 2012). Moreover, if a participant responded in a language other than English (i.e., Tagalog or Cebuano), I immediately presented a translation to him and verified for accuracy of meaning. In this manner, I was also able to check or bracket my biases and conscientiously ascertain that what I was hearing, as much as possible, was “really what the interviewee [was] trying to put across, not a partial or mistaken interpretation resulting from [my] common-sense assumptions or presuppositions” (Denscombe, 2014, p. 101). Each interview lasted for about an hour.

**Focus group discussion.** Having obtained sufficient information about the leadership experiences of the participants, I gathered once again the Jesuit school directors who were willing and available to discuss their common experiences in leading mission schools and the implications of their lived experiences to the kind of formation or leadership training in the seminary. We held the hour-long focus group discussion (FGD) at the headquarters of the mission district as a kind of group interview. Three school directors for academic year 2018-2019 and one past (academic years 2013-2016) actively participated.

While comparable to individual interviews, the FGD, as a method of gathering data was different in the sense that it was used not to “obtain depth and detail about each participant . . . but hear from a range of participants” (Morgan, 2012, p. 353) about specific and common interests related to the research, and thus, yielded a sense of synergy and a collective perspective about the issues or topics discussed (Cohen et al., 2018; Denscombe, 2014). Data were then culled from this particular group dynamics of conversing about shared experiences and became a

valuable summative evolution tool to recognize, acknowledge, and address the concerns and experiences of the participants about their leadership roles in the mission schools and the specific formation program that prepared them for their responsibilities.

Thus, the participants in the FGD were given an occasion to listen to each other's experiences, reflect on their insights, and express their perception of the Jesuit scholasticate's leadership formation curriculum, pedagogy, and assessment processes and how all these could be further improved for the benefit of future school leaders (see Appendix D for the protocol).

### **On-site Participant Observations**

The fourth manner by which I gathered data was still very much in line with the phenomenological design of the study. I performed on-site participant observations that gave me insights about the actual day-to-day activities of four school directors at their respective mission schools. Quoting the seminal work of Becker and Geer (1957, p. 28), Denscombe (2014) highlighted the key characteristics of this method of data collection:

By participant observation we mean the method in which the observer participates in the daily life of the people under study, either openly in the role of researcher or covertly in some disguised role, observing things that happen, listening to what is said, and questioning people, over some length of time. (p. 198)

In other words, a crucial feature of observation as a data gathering tool is how it allows a researcher the privileged opportunity to gather “first-hand, ‘live’ data *in situ* from naturally occurring social situations” (Cohen et al., 2018, p. 542) as they really are.

Besides the phenomenological value of seeing things as they present themselves to be (Denscombe, 2014), on-site participant observation was also helpful in corroborating what the participants had shared in the interviews and gathering further information about other sensitive and unspoken issues (Cohen et al., 2018). This manner of collecting more information about the

school leaders as they worked, enabled me to have a renewed sense of the leaders' local context, their regular interactions with school stakeholders (i.e., faculty, students, and parents), and their manner of addressing delicate concerns especially relating to inclusivity and equity for marginalized students in their schools.

In this study, I accompanied four participants during the days that led to the opening of classes (school year 2019-2020) and observed how they presided at meetings, interacted with their lay colleagues, related with students and parents, and managed the general operations in their schools (see Appendix E for on-site observation protocol).

### **Documentary Research**

The last manner by which I collected data was through documentary research. I looked into several documents from the mission schools as well as some seminary or formation documents that were made available to me as sources of primary data.

As Denscombe (2014) pointed out, there were a couple of important reasons for going back to documentary sources in social research. First was the documents' evidentiary value. Within their contexts, these artifacts revealed meanings which might not be immediately apparent in the other ways of data collection, such as interviews and observations (Denscombe, 2014). Drawing sense from documents, however, required a researcher's close reading and careful interpretation of them (Denscombe, 2014). Second was the permanency of documents. These items which come in various types, remained in a stable form well beyond the time they were produced (Denscombe, 2014). Although this quality presented a great advantage for a social researcher who sought consistency in the source of data, it might also pose a hermeneutic

challenge. Thus, any kind of documentary evidence should not be taken at face value (Denscombe, 2014; Martin, 2018; Mogalakwe, 2006).

In using historical documents, the researcher must ascertain their validity and reliability (Denscombe, 2014; Martin, 2018; Mogalakwe, 2006; Scott, 1990). John Scott (1990), in his book *A Matter of Record: Documentary Sources in Social Research*, enumerated four elements that a researcher must consider before using documents as primary data source: (a) authenticity, (b) credibility, (c) representativeness, and (d) meaning. Table 4 lists the documents that I examined in this research.

Table 4  
*Documents Examined in This Research*

Document	Description
1. Minutes of the latest Board of Trustees Meeting from three of the four mission schools	1. Notes on how the school director worked with the school board in advancing the school's mission
2. School Director's Report authored by two previous directors assigned in two of the mission schools	2. Notes on any school activity and development that indicate the school leader's leadership vision and priorities
3. Meeting agenda and notes from a school director presiding at an administrators' meeting	3. Notes that indicated the school leader's facility to run administrative meetings and delegate responsibilities
4. Blank formand's evaluation documents: <ul style="list-style-type: none"> <li>• Regency evaluation form (see Appendix H)</li> <li>• Theologate self-evaluation form (see Appendix I)</li> <li>• Theologate peer-evaluation form</li> <li>• Information for ordination form</li> </ul>	4. Documentary evidence to show how the Jesuit scholastics are evaluated, particularly on the aspect of apostolic leadership growth
5. A former school director's transcript of records from Loyola School of Theology	5. Shows the various academic courses that a former school director took in preparation for his ordination to the priesthood and eventual assignment to a mission high school.
6. Course syllabi of a pastoral methods and Christian social ethics classes from Loyola School of Theology	6. Provides the specific course information to two academic classes which Jesuit formands, including some of the participants in this study, are required to take prior to their ordination.
7. A sample of the leadership competencies and reflection tool developed by the Ateneo- Center for Organization Research and Development (Ateneo-CORD, 2015) for the Jesuit Conference of Asia Pacific (see Appendix N).	7. Shows an evaluative tool that can be a model for a leadership assessment instrument for Jesuit formands.

The documents from the mission schools gave me a glimpse into how the participants were able to gain knowledge and skills to recognize organizational concerns and address vital issues, especially those that pertained to the inclusive learning of disadvantaged students. The other set of internal documents that I secured from the Philippine Jesuit province and from the



Loyola School of Theology<sup>8</sup> showed the current seminary curriculum for pastoral ministries in the Jesuit theologate in the Philippines as well as the various instruments used to evaluate a Jesuit in-formation outside the context of his academic training.

In Figure 5, I present a visual summary of the manner of gathering data for this study.

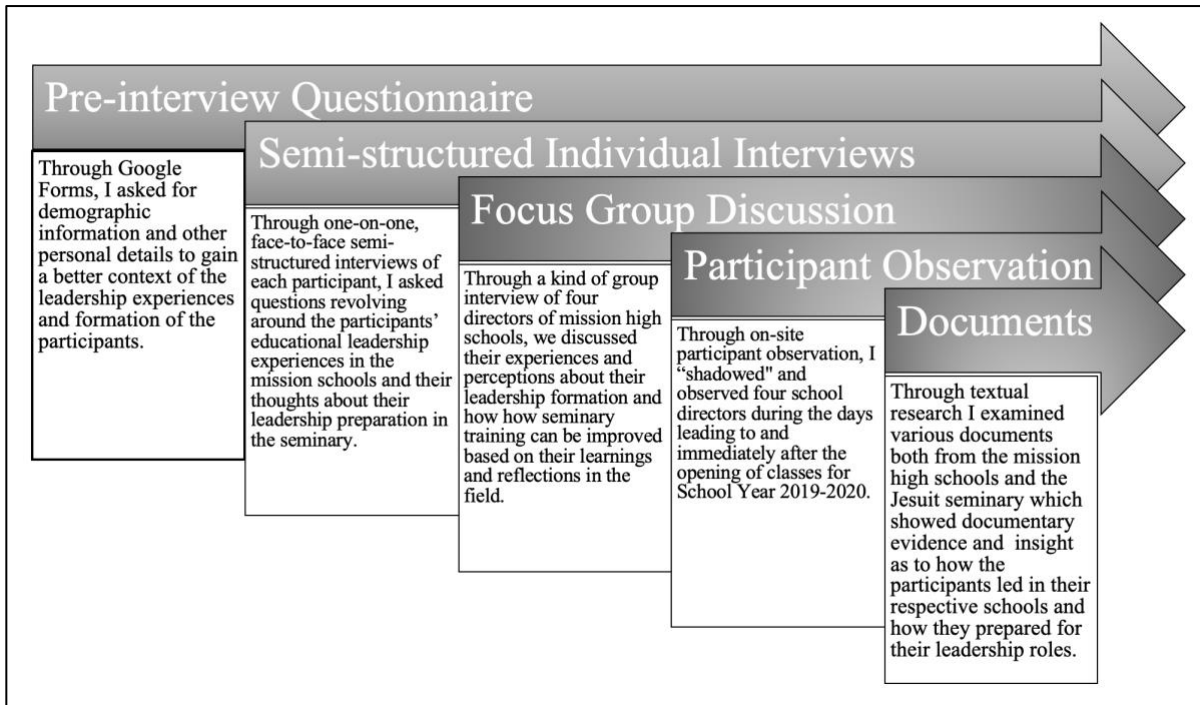


Figure 5. Qualitative data gathering methods. This is a summary illustration of the various qualitative methods of gathering data for this phenomenological study. The intentional use of multiple data gathering tools allowed for triangulation of information from various sources and an improved manner of recording and describing the complex phenomenon in this study.

### Analysis Plan

In this section, I will lay out my plan to analyze the qualitative data that I had gathered in this study. I will begin with a brief discussion on the need to adequately prepare and organize the available qualitative data before they are thoroughly analyzed. After which, I will present the

<sup>8</sup> The Loyola School of Theology is the Jesuit Theologate in Manila. It is where all the participants acquired their bachelor's degree in Sacred Theology where they also took courses in pastoral ministry in preparation for specific roles that they may be eventually assigned in as ordained ministers.

manner of data “explicitation” as a phenomenological process of making sense of the qualitative information that have been gathered.

### **Handling and Preparing Collected Qualitative Data for “Analysis”**

I placed the word “analysis” in quotes to acknowledge and follow the cautionary advice of Groenwald (2004) and Hycner (1985) who emphasized that in a phenomenological study, the usual notion of analysis should be avoided. Instead, a nuanced consideration of the whole phenomenon must be maintained always (Groenwald, 2004; Hycner, 1985) as various components of the phenomenon are made explicit. Thus, Groenwald (2004), following Hycner’s (1985) qualification, used the term “explicitation” which the latter had attributed to the work of American psychologist and phenomenologist Amedeo Giorgi. Following this same criterion, I have also used the term “data explicitation” to emphasize the value of looking at the whole phenomenon and not simply compartmentalizing it through the regular process of analysis. Hence, through the process of data explicitation, I was systematically making *explicit* the meaning that the participants attributed to their experience of leading in the mission high schools after undergoing the kind of seminary training that they had.

**Data storage.** There were two general types of materials that I needed to store securely in order to maintain the integrity of the study as well as protect the privacy of the participants. There were printed data or hard copies of transcripts and notes (i.e., observation and field notes) that I kept under lock and key. There were also electronic data which were in the form of audio recordings, scanned documents, and soft copies of transcripts and notes. These data were also securely kept and password-protected in the hard drive of my laptop. I also kept back-up files of the electronic data in a separate password protected external hard drive.

**Transcription.** I produced transcripts of all the individual interviews as well as the conversations in the focus group discussion through the aid of the Otter.ai app (version 2.1.8.510 Copyright 2020 by Otter.ai). It is a sophisticated voice recorder that captures long-form English conversations and almost instantaneously presents a transcription of the recorded exchanges between multiple persons. I double checked what was automatically generated by Otter.ai (2020) by personally listening to the audio recording several times and correcting the transcription when necessary. The transcripts were sent to the participants for member checking.

**Annotation.** Hycner (1985) noted that transcripts must include not just the recorded statements, word for word, but the accompanying non-verbal and para-linguistic communication that might have been expressed by the participant(s) in the course of the interview or discussion. Examples of these would be when the participants' voices would raise to emphasize their points and meaningful side comments or laughter that accompanied their thoughts. In order for me to accommodate this suggestion, I took note of these distinct mannerisms and cues in a separate journal and paid careful attention in describing how, when, and where they occurred. As I went back and reviewed the transcripts with the audio recordings, I also indicated these with the corresponding texts.

**Data disposal and destruction.** As part of my commitment to confidentiality, I will permanently destroy, after a year from the time the dissertation has been presented and approved by my committee, all printed and electronic materials, including notes that may inadvertently identify the specific participants.

Figure 6 is an illustration of how I handled and prepared the raw qualitative data for explication and phenomenological interpretation.

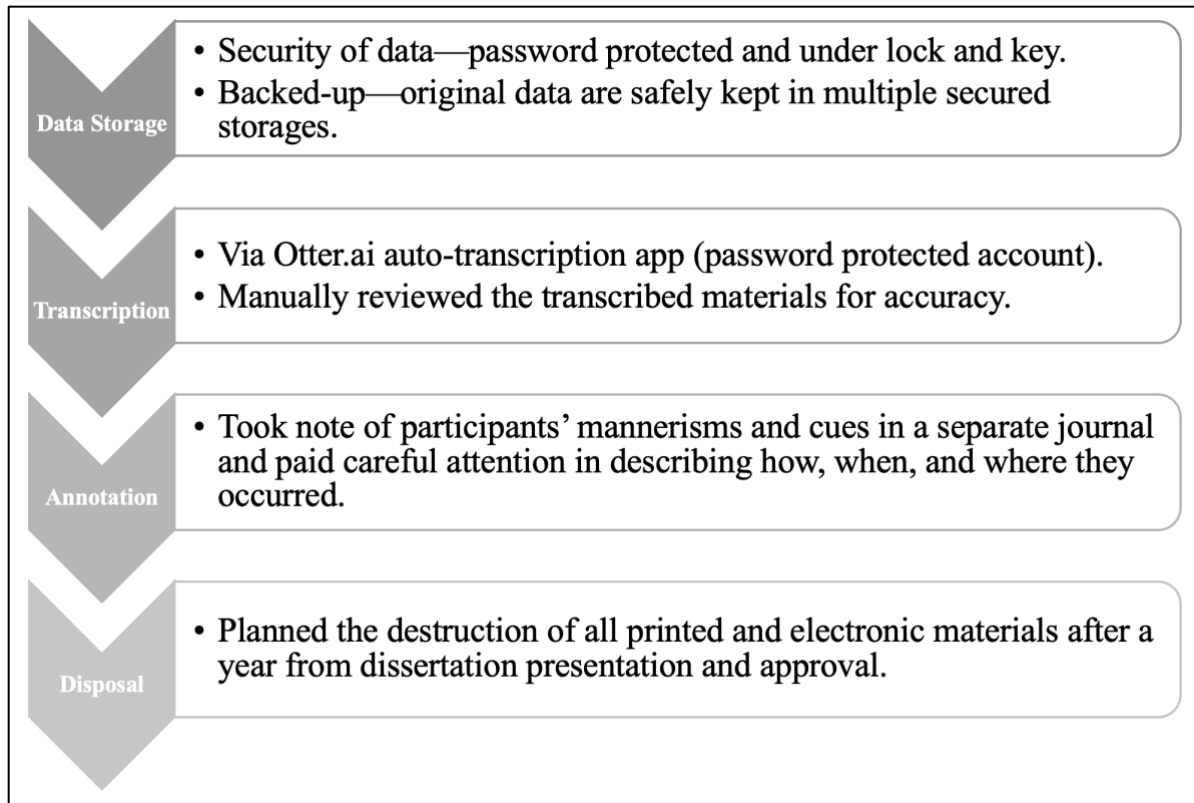


Figure 6. Handling and preparation of qualitative data. This is an illustration of how qualitative data was handled and prepared for data explication in this phenomenological study.

## Data Explication

Explication denoted an “investigation of the constituents of a phenomenon while always keeping the context of the whole” (Hycner, 1985, p. 300). In this study, I followed this principle and generally applied the same but simplified steps of data explication that Hycner (1985) provided. Moreover, I divided these steps into two stages.

**First stage.** The first stage pertained to the explication of data from each qualitative material or source. As I maintained a phenomenological disposition of active receptivity, I identified, grouped, and assessed units of meaning from the participants and other sources.

**Bracketing and phenomenological reduction.** Phenomenological reduction is not the same as the reductionist natural science methodology (Groenwald, 2004). Instead,

phenomenological reduction is the purposeful, reflective, and conscientious receptivity of the researcher to the phenomenon as it presents itself and its meaning (Groenwald, 2004; Hycner, 1985). In order to facilitate such an active receptivity to the meanings that the phenomenon presented, I suspended or bracketed my a priori interpretations regarding each of the participant's experiences and reflections. I tried to be as neutral as much as I could in entering the unique circumstances and contexts of every participant.

Operationally speaking, this meant that I had to be transparent to my dissertation committee about my positionality, so that any kind of intrusion in the explicitation of data due to my biases could be checked accordingly. In terms of dealing with the audio recordings, transcripts, as well as my observation notes, I followed Groenwald's (2004) recommendation: I had to listen to the recordings repeatedly and go over the transcripts and notes judiciously. In doing so, I became accustomed to the words and worldview of the participants and developed a holistic sense or gestalt of the phenomenon that they had lived. Regular member checking with the participants during and after the data gathering phase, was another way for me to keep this receptive disposition towards the phenomenon in focus. In other words, self-reflexivity and intersubjectivity went hand in hand during data explicitation.

***Identified meaningful units.*** This was the beginning of the meticulous process of going back to the audio recordings, transcripts, documents, and notes and sifting through every word, phrase, sentence, and paragraph to elicit meaning from the participants or the documentary evidence. This was one of the most crucial steps in the explicitation of data. While maintaining the disposition of openness, I made a considerable amount of judgment in distinguishing and

listing the relevant units of general and logical meaning from the available data. Hycner (1985) defined these units of meaning as follows:

[W]ords, phrases, non-verbal or para-linguistic communications which express a unique and coherent meaning (irrespective of the research question) clearly differentiated from that which precedes and follows. (These might most easily be recorded in the special margin alongside the transcription). If there is ambiguity or uncertainty as to whether a statement constitutes a discrete unit of general meaning, it is best to include it. Also at this point all general meanings are included, even redundant ones. (p. 282)

Thus, for every copy of the transcripts (of the interviews and focus group discussion), observation notes, and documentary evidence, there was enough space in the margins for me to manually note the words, phrases, even comments (e.g., similar to “in vivo codes”) drawn from the data that determined the discrete units of logic and meaning. These allowed for distinct parts of the data to stand-out, regardless if these were later on coded as “essential, contextual, or tangential to the structure of the experience” or not (Hycner, 1985, p. 282). In other words, although these units of meaning, as such, were not yet necessarily the answers to the research questions, they were essential in determining clusters of meanings or themes that ultimately led me to propose answers to the research questions.

*Grouped meaningful units.* I carefully revisited the identified units of meaning and drew out general ideas from each material or data source. To facilitate this, I took the example of Groenwald (2004) and first considered the literal content of each unit of meaning, its frequency in the text or transcript, and how it was stated in the interviews or used in the documents. I then eliminated those which were only remotely connected if not, outrightly irrelevant to answering the research questions (e.g., those not related to leadership experiences and formation of Jesuits).

After this initial step, I then grouped together similar units of meaning across the various materials (i.e., answers from the questionnaire, transcripts from interviews, notes from

observations, etc.) In doing so, I was beginning to identify, too, central and recurrent ideas about the phenomenon being studied.

*Assessed and validated.* After clustering the meanings and apprehending the general sense of each material, I moved towards assessing and validating them before I eventually thematized the various collected data.

*Preliminary assessment.* I made an assessment of the clusters of meanings that emerged and tried to view them once again from the perspective of the participants or the source(s) of the documents. In an outline form, I presented them to my dissertation chair in a meeting to ascertain that I was not imposing any premature interpretation. In addition to this, I also reached out to some Filipino Jesuit educators and formators to ask their thoughts about my initial findings and the manner I was understanding them.

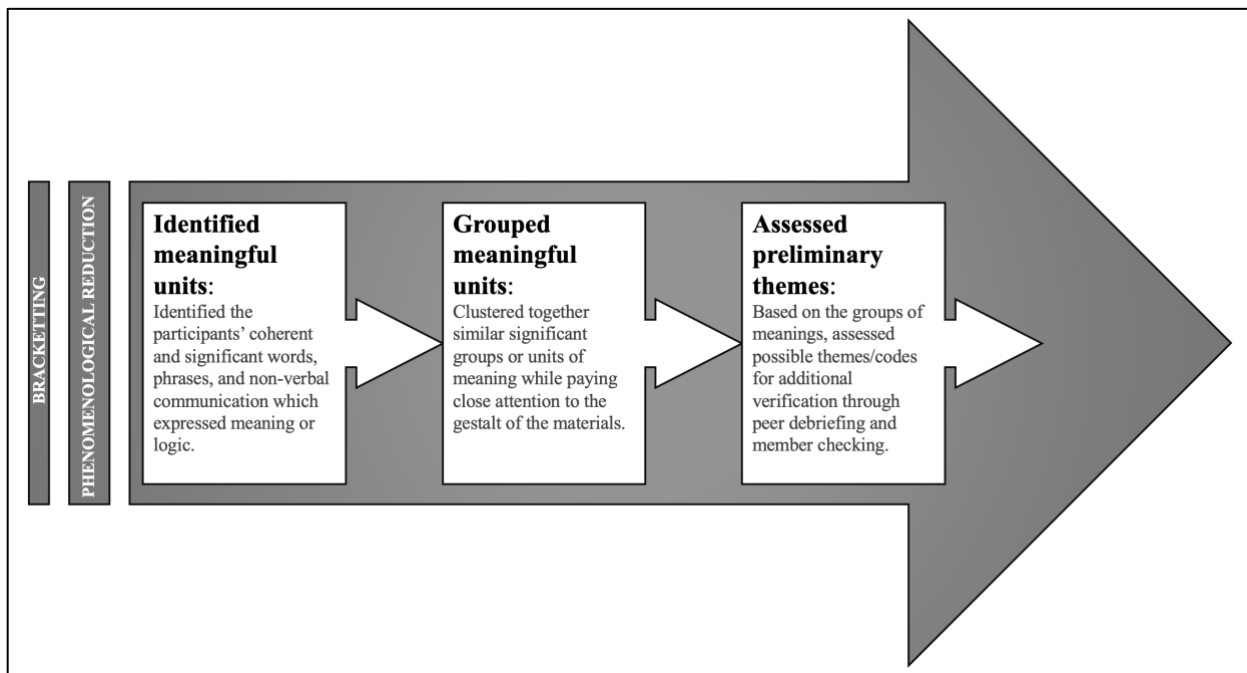
*Member check.* Also, I contacted each participant and presented to him his respective transcript of interviews and my initial assessment of meanings and themes that I gathered from the materials. This manner of member checking was done online either via email or electronic messenger.

Through this integral process of validating of what was said or shared with what I have understood thus far, I was asking the participants to evaluate if I had accurately described their experience, captured the meaning of those experiences, and interpreted the meaning of those experiences according to their lived reality (Sandelowski, 2012) in the mission schools. Similarly, I did the same process with the evidentiary documents (i.e., School Director's report and Minutes of Board of Trustee [BOT] meetings) pertinent to their leadership and formation by asking clarifying questions about them when needed.

*No modification needed.* None of the participants alerted me to any inconsistencies and inaccuracies with the way I assessed and understood the qualitative data from them.

Accordingly, I did not have to make any corrections to my transcripts and preliminary themes and was able to proceed to the next steps of data explication with the aid of the NVivo 12 data transcription software (version 12.5.0.3729, Copyright 2019 by QSR International Pty Ltd).

Figure 7 illustrates and summarizes the first stage of data explication of the qualitative information that I gathered from various resources.



*Figure 7.* The first stage of data explication. The first stage involved the manual process of identifying units of meaning and clustering them in order to assess through peer debriefing and member checking the preliminary themes which will be finalized and used in the second stage of data explication. Throughout the phenomenological reduction process, I had to properly bracket my a priori notions of the participants, their contexts, and the general environment of the research setting.

**Second stage.** The second stage collated the validated clusters of meanings from the individual resources into a coherent and detailed descriptive summary of the phenomenon with its various components as experienced and lived by the participants. At this point, I moved from



the manual system (e.g., paper and pen) of identifying and noting ideas to an electronically assisted manner of classifying, coding, and retrieving pieces of data according to themes.

*Identified common and unique themes.* Having carefully done the first stage of data explication, I then identified and consolidated the verified themes that were common to most or all the interviews and discussions, as well as those that emerged from the on-site observation notes and documentary research. As Hycner (1985) pointed out, this process required a phenomenological perspective of drawing out essences and discerning “existential individual differences” (p. 292).

*Common themes.* The first step was to identify the common themes (e.g. missioning to the new assignment, helping *Lumad* students, etc.) that cut across all or most of the different materials which I had earlier identified in the first (manual) stage. Once categorized, I judiciously went back to scour again the electronic copies of the data that by now, had already been uploaded into the NVivo 12 (2019) software. I then used these common themes to electronically code or tag all the available material (uploaded in NVivo 12 (2019)). I grouped these themes together to indicate a general theme (e.g., leadership experiences, perceptions about formation, etc.) that I identified from each group of data source. I used these common themes as NVivo 12 (2019) “parent nodes” for classifying or grouping the various segments of the qualitative data.

*Unique themes.* The next step was to note when there were unique themes (e.g. clericalism, paradigm shifts, etc.) that came out in one or only a minority of the materials. Hycner (1985) underscored that the distinctiveness of these variant themes could be significant counterpoints to the over-all theme which would then give a richer perspective of the meaning of

the phenomenon being studied. I also used these unique themes as NVivo 12 (2019) nodes for classifying or coding the various sections of the collected data as they occurred.

*Applied to the conceptual framework.* Without intending to limit the meaning of the phenomenon but simply using it as a guide to make further sense of the explicated data in relation to the research questions, I identified which among the general and unique themes could (also) be clustered according to the nine dimensions of the conceptual framework presented in Chapters 1 and 2.

Below is Figure 8 that revisits these dimensions. Inside the dotted-lined box are the nine key areas that result from the intersection of the horizontal and vertical elements of the framework: (a) Conscience-curriculum, (b) Conscience-pedagogy, (c) Conscience-assessment, (d) Competence-curriculum, (e) Competence-pedagogy, (f) Competence-assessment, (g) Compassionate commitment-curriculum, (h) Compassionate commitment-pedagogy, and (i) Compassionate commitment-assessment.

<b>Conceptual Framework for Data Explication</b>	<b>Conscience</b> (dispositions and values that lead to critical consciousness)	<b>Competence</b> (conceptual knowledge)	<b>Compassionate Commitment</b> (practical skills)
<b>Curriculum</b> (program content)	Jesuit seminary training content related to the participants' disposition and value formation towards critical consciousness	Leadership concepts needed by the participants in leading equitable mission schools	Practical leadership and management skills needed in leading equitable schools
<b>Pedagogy</b> (how the content is taught/learned)	Delivery of seminary formation content to develop critical consciousness	Manner by which the participants' learned about leadership concepts	Methods used to develop and apply practical leadership skills in and beyond the seminary
<b>Assessment</b> (breadth and depth of learning and application)	Evaluation of the development of the participants' critical consciousness as a Jesuit leader	Evaluation of the participants' knowledge about educational issues before being missioned	Holistic evaluation of the participants in applying these skills before being missioned to lead mission school

Figure 8. Revisiting the conceptual framework for data explication. The nine dimensions of a Jesuit preparation program for educational leadership for social justice are enclosed within the dotted line. These dimensions are the intersections of the three leadership competencies (horizontal axis) and the three program components (vertical axis). This framework guided the data explication process. In Chapter 5, this framework will also be the basis for the recommendations in practice. Adapted from “Toward a Framework for Preparing Leaders for Social Justice,” by C.A. Capper, G. Theoharis, and J. Sebastian, 2006, *Journal of Educational Administration*, 44(3), p. 220. Copyright 2006 by the Emerald Group Publishing Limited. Used with permission.

*Wrote the composite summaries within the interpretive horizon.* After electronically taking note of all the relevant common and unique themes and applying them according to the elements of the conceptual framework when applicable, I placed all the themes back within the holistic context of their meanings and in relation to the purpose of this research. Through the aid of NVivo 12's (2019) matrix coding query feature, I developed the structure and content of my data presentation (Chapter 4). Thus, writing the composite summaries as thematic findings that sufficiently answered the research questions was the final step in the data explication. This stage can rightly be called phenomenological interpretation according to Sadala and Adorno (2002). Through this final process, I attempted to transform “the participants’ everyday

expressions into expressions appropriate to the scientific discourse supporting the research” (Sadala & Adorno, 2002, p. 289).

Figure 9 illustrates and summarizes the second stage of data explicitation for this study.

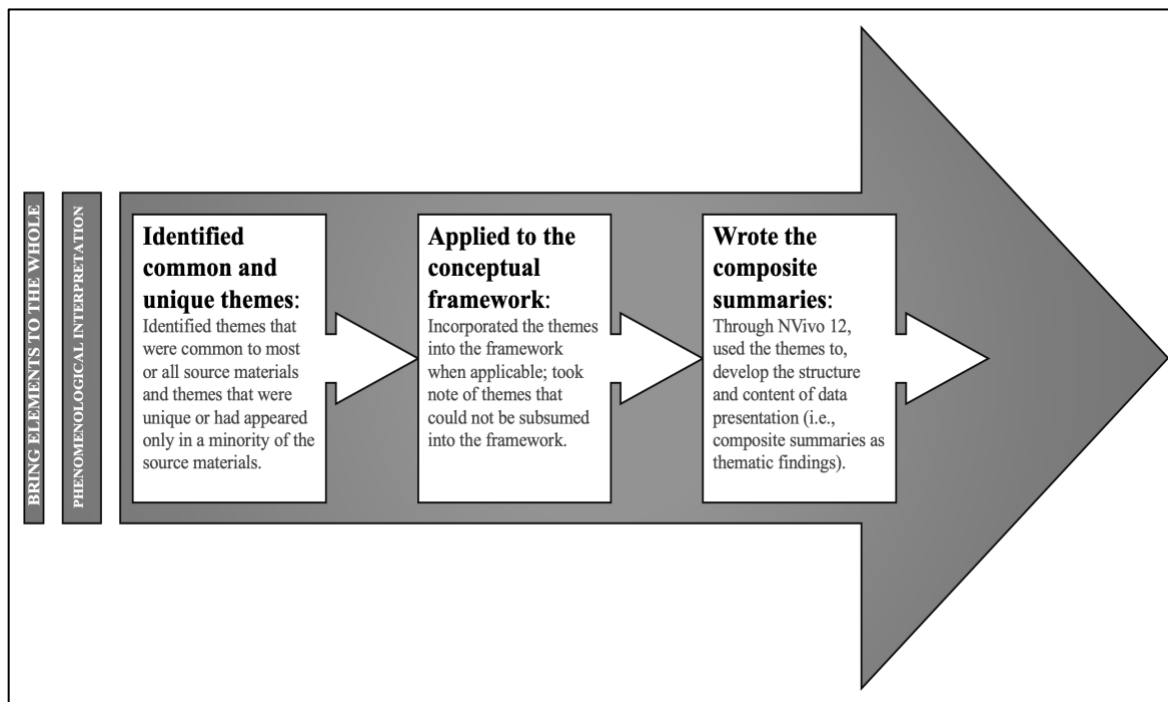


Figure 9. The second stage of data explicitation. The second stage was the process of describing the full phenomenon, interpreting it within its original context by identifying the themes, applying them into the framework, and finally writing a summary of the findings.

### Trustworthiness

Reliability and validity are criteria which logical empiricism seems to impose on qualitative studies (Beck, 1994; Creswell, 2014). These standards, however, take on a more nuanced meaning in phenomenological research. As Creswell (2014) explained, “qualitative validity means that the researcher checks for the accuracy of the findings by employing certain procedures, while qualitative reliability indicates that the researcher’s approach is consistent across different researchers and different projects” (p. 223). In this section, I will enumerate

steps that I employed in order to reach an acceptable level of trustworthiness and credibility in this study.

### **Qualitative Validity**

Throughout the data gathering and explicitation processes, I incorporated several strategies that ensured the qualitative validity of the research. All of these approaches were meant to guarantee the careful assessment of the accuracy of the data that I gathered.

**Use of multiple data sources.** By having several sources of information through multiple qualitative data gathering tools (i.e., pre-interview questionnaire, semi-structured interview, focus group discussion, on-site observation, and documentary review), I was able to record and describe the complex phenomenon more holistically and realistically.

**Triangulation of data.** By having several sources of information through multiple qualitative gathering tools, I was able to build a coherent rationalization of units and clusters of meaning (e.g., general themes) that are firmly identified and developed from converging sources and perspectives (Creswell, 2014).

**Presentation of discrepant information.** A phenomenological study does not wish to oversimplify the richness of the lived experiences of the participants. Thus, I also presented any divergent and unique themes that came out in the data explicitation. Creswell (2014), clarified that, “because real life is composed of different perspectives that do not always coalesce, discussing contrary information adds to the credibility of an account” (p. 224).

**Regular member checking.** As previously mentioned, by presenting back to each of the participants the various transcripts and the preliminary assessment of my understanding of their experiences, I was able to identify and correct any misreading of the data. This strategy assured

an accountability to the veracity of the interpretation of all the gathered information (Creswell, 2014).

**Immersed in the field.** Spending an appropriate amount of time with the participants in the field increases “in-depth understanding of the phenomenon under study and can convey details about the site and the people that lend credibility to the narrative account” (Creswell, 2014, p. 225). Although I worked in the Jesuit mission district for three years, I spent almost two months reacquainting myself to the environment in order to enter, once again, the worldview of a Jesuit missionary in the margins.

**Peer debriefing and consultations.** Peer debriefing through frequent consultations with my dissertation chair and some Filipino Jesuits in the education and formation ministries was a way to improve the accuracy of my interpretation of the phenomenon that I studied (Creswell, 2014). By intentionally seeking their questions and feedback, I avoided a myopic perspective about my study and incorporated a broader perspective that was shared by more experienced academicians and practitioners.

**Clarification of positionality and avoiding confirmation bias.** I was transparent about my positionality as a researcher and sensitive to any biases that I might have had about the current study. Though helpful in giving me access to the participants, I needed to temper my insider’s perspective with an honest sense of reflexivity and openness to external feedback. I acknowledged how my background as a Filipino Jesuit who was once a school director but has now pursued further studies in the US, could affect my understanding of the lived experiences of the participants. Thus, I needed to consistently bracket (as discussed in an earlier section) my preconceived notions and sensibilities as I collected and handled data for interpretation. I was

very much aware of the danger of confirmation bias and so, I was extra cautious that I was not interpreting the data that I gathered as simply an affirmation of my existing beliefs about educational leadership and seminary formation.

### **Qualitative Reliability**

The following section lists the ways by which I tried to show consistency in this particular study with similar phenomenological research in and outside the field of education.

**Provided detailed protocols.** In the various appendices related to the Chapter 3, I have provided detailed protocols in gathering, organizing, and interpreting the qualitative data. The procedures were generally based on previous phenomenological studies (Groenwald, 2004; Hycner, 1985) and could be followed as a pattern for future investigations.

**Checked the transcripts.** Transcriptions must be as accurate as possible because this is the basis of most of the data interpretation (Creswell, 2014). As such, I checked for precision by repeatedly reviewing the transcripts with the audio recording and presenting the transcripts to the respective participants for verification.

**Cross-checked units and clusters of meaning.** Similar to the process of peer debriefing, I enlisted the help of my dissertation chair to cross-check and validate the meanings (i.e., codes) that I assigned in my process of explicating the data. This process was analogous to Graham Gibbs's (2007) thorough manner of thematic coding and categorizing that required another researcher other than the current investigator to cross-check their codes and determine a kind of inter-coder agreement.

## **Ethical Considerations**

As Gay, Mills, and Airasian (2012) explained, a qualitative study, such as this phenomenological research, provides very little distance between the participants and the researcher. This relationship is needed in drawing out meaning from the participants, but it can also be a cause of tension and harm for both parties. Hence, I took into serious consideration the effects of the research on the participants (Cohen et al., 2018). My chief responsibility towards them was to “act in such a way as to preserve their dignity as human beings” (Cohen et al., 2018, p. 112).

All the participants in this research were adults who were capable of making decisions for themselves. Nonetheless, before I collected data from and about the participants, I secured a written permission from the local Jesuit superior to gain access to the various school sites in the SPMD (see Appendix F for a copy of the letter of request). Moreover, I requested from each participant a written informed consent to conduct the interviews and observations as well as gain access to some personal scholastic background and school administrative documents that were related to their leadership formation and experience (see Appendix G for a copy of the informed consent).

## **Limitations**

There were several limitations to this phenomenological study. The following is a brief description of each limitation and how I addressed them.

### **Small Number of Participants**

Unlike quantitative studies where the number of subjects can go by the hundreds, a qualitative phenomenological study, by design, has fewer participants (Hycner, 1985). In his



review of various phenomenological studies, Creswell (2014) observed that the usual number of participants in qualitative researches ranges from six to 10. Through purposive sampling, I ended up with seven participants for this study. This small number was due to the restrictive qualifications that was required of each participant: a Filipino Jesuit, who after just a year or so after priestly ordination (i.e., newly ordained), had already been assigned as a first-time school director to lead a mission high school in the Southern Philippines. Moreover, his leadership experience must be at least a full academic year. This study compensated for the lack of breadth in terms of the number of participants with the depth of data that were acquired from and about the participants themselves.

### **Reduced Generalizability**

As a result of a lack of randomness in participant sampling as well as the small number of subjects, the study's generalizability was also limited. The particularity of the research site and the contexts of the participants might not be representative of the majority of the Filipino clerics or religious men and women who have been assigned to lead schools in urban centers. Furthermore, the Jesuit formation program in the Philippines, though following the general tenets and spirituality of the broader organization of the Catholic Church and the universal Society of Jesus, had nuanced ways of emphasizing and implementing these elements and may not be immediately comparable to other dioceses and Jesuit provinces in other parts of the world. Nonetheless, as Hycner (1985) underscored, the academe and the general public can still learn much from the profound insights that arise from phenomenological information.

## **Qualified Accuracy of Participants' Narratives**

Another limitation was on the level of exactitude in the participants' narrations and descriptions. Although all the participants were presumed honest, articulate, and intelligible (having finished at least 11 years of Jesuit formation and earning graduate degrees in the process), I was aware of the difficulty of retrospective narration and confabulation. Simply put, a participant who was asked to look back at his experiences in the past might not be able to provide all the details accurately. Moreover, he might inadvertently "fill in gaps in memory according to his subjective viewpoint" (Hycner, 1985, p. 296). To address this issue, I made use of multiple qualitative data gathering tools in order to triangulate and corroborate what each participant shared in his interviews.

### **Summary**

As discussed in this chapter, I employed a phenomenological research design to answer the research questions. I described the research setting and also enumerated the criteria for my purposeful choice of participants. There were five ways by which I collected qualitative data: (a) pre-interview questionnaire, (b) semi-structured face-to-face interviews, (c) focus group discussion, (d) on-site observation, and (e) documentary research.

After preparing and organizing the voluminous information, I made use of a two-stage explication of data in order to arrive at a validated composite summary of the findings. This "meaning-making" process would draw-out valuable insights that have consequential and practical implications to the preparation of future Jesuit educational leaders for the mission schools. Cognizant of some intrinsic ethical concerns and methodological limitations, I finally discussed how I addressed these issues in the study.

## **CHAPTER 4**

### **FINDINGS**

#### **Introduction**

In this phenomenological study, I explored the experiences of first-time Jesuit school directors of mission high schools in the Southern Philippines. I examined their perceptions about the leadership formation that they received as seminarians before being missioned to the ministry of leading schools in the margins.

#### **The Value of the Study**

By analyzing the participants' leadership experiences and perceptions about their preparation as school directors in Jesuit mission high schools in the Southern Philippines, I have determined how their context and circumstances may inform improvements to the educational leadership preparation of future Jesuit priests. These recommendations can offer practical initiatives that Jesuit leadership can take to prepare better those who are still in the formation pipeline and may be assigned in mission schools soon.

#### **How the Phenomenological Study was Conducted**

I conducted this research in one of the provinces in the Southern Philippines, where the Jesuit Southern Philippine Mission District (SPMD) has four mission high schools. From eight possible participants, seven ( $N = 7$ ) responded affirmatively to speak about their educational leadership experiences and preparation. I flew to the Southern Philippines and stayed at the SPMD headquarters for six weeks during the data gathering phase. My immersion allowed me to familiarize myself once again with the context of Jesuit missionaries in the area.

**Data Gathering.** Those Jesuits who agreed to participate in the study answered an online pre-interview questionnaire that asked for some of their demographic information as well as initial thoughts about the main topics of this study. I used their answers in the questionnaire as a springboard for our face-to-face, semi-structured individual interviews. After this, I observed four school directors at work in their respective mission schools. I also facilitated a focus group discussion that was attended the same four school directors. Finally, I collected some pertinent school records (i.e., minutes of Board of Trustees meetings and President's Reports) and formation documents (i.e., evaluation forms and theological Formation curriculum), which I used to supplement the data that I have gathered from the participants.

**Data Explication.** After I had collected the data, I proceeded with the two-step data explication process detailed in Chapter 3. In the whole process of data collection, presentation, and synthesis, I paid close attention to my positionality and tried to bracket any of my preconceived notions. Moreover, I also performed member checking and peer debriefing to attain the desired trustworthiness for the study.

### **Restating the Research Questions**

I meticulously undertook the above-mentioned methodology in the effort to adequately answer the following research questions:

- What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?

- What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders?

### **Organization of the Chapter**

The rest of this chapter is organized in the following sections that sufficiently answer the research questions. I will proceed with a presentation of the participants' profile, which helps contextualize the responses of the participants in the interviews and discussions. As a direct response to the first research question, the subsequent section gives a detailed description of the various aspects of the educational leadership experiences of the participants. The next section then addresses the second research question by detailing the participants' perception of the kind of leadership preparation that they had received during their seminary formation. This chapter concludes with a summary and synthesis of the explicated data.

### **Profile of Participants**

Describing the seven participants in this section contextualizes further their responses and contributes to a deeper appreciation of their experiences and perspectives in this phenomenological study. For reporting purposes, I clustered them into two groups: (a) current, those who were still school directors for academic year 2018-2019 and (b) past school directors, those who served as school directors before 2018-2019. Two participants during the data collection process were in-transition as regards their assignments (e.g., incoming and outgoing school directors). This particular circumstance is noted below. I also used pseudonyms for the participants and their places of ministry and intentionally avoided any information markers that can easily identify them.

### **Current School Directors (School Year 2018-2019)**

Four participants were representing the four mission high schools in the SPMD. Fr. Aloysius, Fr. John, and Fr. Robert were continuing their terms this school year, whereas Fr. Paul, after being school director in a mission school for two years, planned to transfer-out in the 2019-2020 school year and serve as a chaplain in a more traditional Jesuit high school.

**Fr. Aloysius.** The school director of St. Mark's for school year 2018-2019 was Fr. Aloysius. He earned a bachelor's degree and worked in a charitable institution before entering the Society of Jesus in 2001. As a Jesuit scholastic, he spent four years of his regency formation as a high school teacher and campus minister in a couple of Jesuit schools in the Philippines. He was ordained to the priesthood in 2015 and was immediately assigned by the provincial superior as an assistant chaplain in a public hospital where he ministered to indigent patients for two years (Jesuit Philippine Province, 2016b, 2017). At the end of the academic year 2016-2017, the provincial sent Fr. Aloysius to an SPMD mission station in the Southern Philippines where he started his ministry as a first-time school director of St. Mark's High School, while also serving as one of the pastors in the parish (Jesuit Philippine Province, 2018).

**Fr. John.** St. Rita's school director for school year 2018-2019 was Fr. John. He was ordained to the priesthood in 2017, after 11 years of basic Jesuit formation. He earned a professional degree and worked for several private companies before entering the Society of Jesus. During his scholasticate years, he was missioned to teach in a mid-sized Jesuit high school for two years (Jesuit Philippine Province, 2013). His first assignment out of the seminary was to be the parish priest in an isolated countryside village within the SPMD (Jesuit Philippine Province, 2018). Towards the end of his first year, however, he also had to replace the Jesuit

school director. Since then, he has been officially designated as the school director while working as the village's parish priest.

**Fr. Robert.** The school president of St. Dominic's for school year 2018-2019 was Fr. Robert. Before he entered the Society of Jesus in 2003, he earned his bachelor's degree. He had worked for more than five years in a multi-national manufacturing company as a specialist for quality control. Before he proceeded with his theological studies, he went through the usual formation stage of regency and was missioned to a large urban Jesuit high school. There, he held multiple responsibilities as a campus minister, prefect of discipline, science teacher, and class moderator. After 12 years of seminary formation, he was ordained a priest in 2015. His first assignment as a clergyman was to serve as an assistant parish priest at a mission area in Western Philippines (Jesuit Philippine Province, 2016b). He stayed there for more than a year and was also asked to help in the Jesuit community college as the director for formation and school treasurer on his last year (Jesuit Philippine Province, 2017). At the beginning of the academic year 2017-2018, he was transferred to SPMD to take on multiple tasks, among which was to be the president of St. Dominic's High School (Jesuit Philippine Province, 2018).

**Fr. Paul.** St. Francis' High School's outgoing school director for school year 2018-2019 was Fr. Paul. He entered the Society of Jesus in 2006. Before he became a Jesuit, he earned a bachelor's degree in one of the top universities in the Philippines and worked as a professional. He spent his first year of regency helping out in a Jesuit university and then proceeded to undergo another year of pre-theology studies (Jesuit Philippine Province, 2013a). Immediately after his priestly ordination in 2017, he was sent to one of the largest and least developed agricultural villages in SPMD. Besides, being the school director of St. Francis', he was also

serving as an assistant parish priest and prefect of the dormitory for the IP students (Jesuit Philippine Province, 2018).

Table 5 is a summary of the pertinent details of the first set of participants for this study. The data have been collected from the pre-interview questionnaires and individual interviews with them.

Table 5  
*Current School Directors of Mission High Schools in SPMD as of Academic Year 2018-2019*

	Fr. Aloysius St. Mark's	Fr. John St. Rita's	Fr. Robert St. Dominic's	Fr. Paul St. Francis'
Educational background before becoming a Jesuit	Bachelor of Arts	Bachelor of Science	Bachelor of Science	Bachelor of Science and a professional degree
Professional background before becoming a Jesuit	Non-profit organization staff	Professional staff	Operations manager	Professional staff
Year entered the Society of Jesus	2001	2006	2003	2006
Year Ordained	2015	2017	2015	2017
Assignment before becoming a first-time school director of a mission high school	Assistant chaplain at a public hospital	Parish priest	Asst. parish priest outside the SPMD ('15-'16) Director for Formation and School Treasurer of a community college outside SPMD ('16-'17)	Scholastic/ Seminarian
Year started as school director	2017	2017	2017	2017
Concurrent responsibilities (aside from school administration)	Parish priest (including ministries to IP communities)	Parish priest	District minister; treasurer; admonitor & house consultor; Assistant director (Retreat House); Coordinator Jesuit IP Ministry	Assistant parish priest, dormitory prefect, and coordinator for mission schools



### **Past School Directors (Before School Year 2018-2019)**

The other three participants in this research were previously school directors who were once assigned in the mission high schools for at least a school year but have since then been missioned elsewhere. Fr. Isaac was the exception in this group as he has been reassigned to SPMD as the incoming school director of St. Francis' High School for the academic year 2019-2020.

**Fr. Isaac.** Fr. Isaac earned a bachelor of arts degree and worked at a Jesuit school even before entering the Society of Jesus in 2001. Fr. Isaac went through the usual eleven-year formation program and spent two years of his regency formation in the same Jesuit high school where he found his Jesuit vocation. In 2012, he was ordained to the priesthood and was sent to a mission station in SPMD to serve as an assistant parish priest. A year after, he was transferred to another rural village where he served both as a parish priest and St. Rita's school director for school years 2013 to 2016 (Jesuit Philippine Province, 2017). After Fr. Isaac's four-year stint in the SPMD, the provincial superior asked him to prepare for further studies as he engaged in part-time campus ministry, first at a sizeable Jesuit university and then in an urban Jesuit high school (Jesuit Philippine Province, 2018). He returned to the SPMD as the replacement of Fr. Paul. For the purpose of this study, however, he specifically shared his past experiences as the former and first-time school director of St. Rita's.

**Fr. Joseph.** One of the youngest among the Jesuit priests assigned in the mission district in the last 10 years, Fr. Joseph earned a bachelor's degree in science and worked for three years as a high school teacher in a private school in Northern Mindanao before entering the Society of Jesus in 2003. During his scholasticate years, he taught for two years in a mid-sized Jesuit high

school at an urban city in the Southern Philippines. After his ordination to the priesthood in 2014, he was sent to the SPMD to be an assistant parish priest at one of the rural villages for 10 months. There, he also assisted Fr. Isaac at St. Rita's High School in an informal capacity. In his second year at the SPMD, he was transferred by the provincial superior to the retreat house, where he served as its assistant director. He was given the additional mission to be the school president of St. Dominic's High School in his third and last year in SPMD (Jesuit Philippine Province, 2017). He stayed there for an academic year (2016-2017) before he was transferred again by the provincial superior, this time, to be the head pastor of an urban parish (Jesuit Philippine Province, 2018).

**Fr. Thomas.** Before becoming a Jesuit, Fr. Thomas earned a bachelor's degree and finished his course work for a master's in business administration. He also had multiple work experiences in the fields of education and finance before entering the Jesuits in the year 2000. He was ordained to the priesthood in 2011 and was immediately sent by the provincial superior to the SPMD. In his first year as a priest, he served as an assistant pastor in the parish and the director of the agricultural training department of St. Francis' Mission High School. The following year, he replaced the parish priest and also became the school director of St. Francis' for two academic years (2012-2014). After three years of ministry in the SPMD, he was transferred to a large urban university to serve as its campus minister for a year. Following this assignment, he then served as the vice president for administration in a medium-sized Jesuit university in Mindanao. This year, he returns to SPMD as its new local superior.

Table 6 gives a summary of the background information of the past school directors/presidents of the SPMD mission high schools. The data in this table have been collated

from the pre-interview questionnaire and individual interviews of the participants. The table indicates this group of participants' professional background before entering the Society of Jesus. It also shows their assignments before and after their term as directors of mission high schools.

Table 6  
*Past School Directors of Mission High Schools in SPMD as of Academic Year 2018-2019*

	Fr. Isaac St. Rita's	Fr. Joseph St. Dominic's	Fr. Thomas St. Francis'
Education background before becoming a Jesuit	Bachelor of Arts	Bachelor of Science	Bachelor of Science and course work for a master's degree
Professional background before becoming a Jesuit	High school religious ed. teacher	High school science teacher	Part-time college teacher; Supervisor at various financial institutions
Year entered the Society of Jesus	2001	2003	2000
Year ordained	2012	2014	2011
Assignment before becoming school director of a mission high school	Asst. parish priest (2012-2013)	Asst. parish priest (2014-2015)	Asst. parish priest (2011-2012)
Academic Years as mission school director	2013-2016 (3 years)	2016-2017 (1 year)	2012-2014 (2 years)
Concurrent responsibilities (aside from school administration)	Parish priest	District minister; treasurer; admonitor, librarian, and house consultant; assistant director of a retreat house	Parish Priest
Assignments after mission high school leadership term	Prepare for studies in social communication;  Pastoral school ministries (outside SPMD)  Back to SPMD as school director of St. Francis' HS	Parish priest (outside SPMD)	University chaplain  Administrator at a Jesuit university  Back to SPMD as Jesuit community superior

## **Educational Leadership Experiences**

In response to the first research question, I will present in this section the varied experiences of the school directors in the mission schools beginning with their thoughts about receiving their assignments as school leaders, then moving to their challenges and successes as school leaders, and finally their reflection on their leadership journey thus far.

### **Buoyed by a Missionary Spirit: Receiving the Mission and Responding to the Call**

Clarke (2002) had noted in his studies among educational leaders from small school environments that their experience of taking on their leadership roles was akin to being thrown in at the deep end. Similarly, the participants in this study spoke of their initial surprise upon finding out about their assignment just weeks before their actual work began. What compelled them to receive the mission and respond to the call was their Jesuit missionary fervor.

**Expecting the unexpected.** Fr. Paul had an inkling as he approached the date of his priestly ordination that he would most likely receive an assignment in the mission district. He had this sense because his Jesuit classmates had a hunch that this was the “trend” among young priests. He found out “more officially” when the assignment came out in the *Province Status*, or the annual listing of the missioning of Jesuits by the provincial superior. That year, the *Province Status* came out several weeks before the ordination rites—a break from the tradition of announcing the Jesuit’s assignment only on the actual day when he was ordained or a few weeks before he reported for duty.

For the case of Fr. Thomas, the missioning came even later than his ordination day. He was told on the day he was to fly to the Southern Philippines that he would supervise the

technical agricultural/vocational component of the mission high school, which he would eventually lead as school director.

Fr. Isaac and Fr. John had similar experiences in terms of taking on the “surprise assignment.” Both were pastors who were responding to an urgent need for “Jesuit manpower” in their mission areas. Fr. Isaac was told two months before the start of the academic year 2016-2017 that he had to fill-in for an ailing Jesuit.

Fr. John, likewise, had to replace the Jesuit school director who vacated his assignment in the middle of the year. When asked if he even had at least a chance to take some “crash courses on school administration” before he actually assumed his position, Fr. John simply said, “None.” The assignment came so sudden that to him, it felt that it was “just dropped like a hot potato.”

Fr. Aloysius, who was ending his first ordained ministry as an assistant chaplain in a public hospital, was straightforward in sharing about his hesitation to take on the unexpected change of assignment. He recounted, “I [originally] declined. Managing a school is not my cup of tea or even interest.” Nevertheless, Fr. Aloysius’s vow of obedience prevailed over him. He reported for work a month before the opening of classes for the school year 2017-2018 as the next school director of St. Mark’s High School.

Though also not expecting a change of assignment after just a year and a half in his first apostolate as an ordained minister, Fr. Robert had a positive disposition in receiving the mission from the provincial. His surprise was almost immediately turned to enthusiasm for the mission. His general sentiment upon learning his new assignment was that of excitement:

Why am I excited? Because I think even before I joined the Jesuits, one of the things I like doing is training. I would have wanted to move into human resources, specifically the training part, organizational development, and I see the assignment to a school in a director level as an opportunity for me to actualize what . . . I have always wanted. So

that gave me the excitement. And the second thing is prior to my assignment in St. Dominic's I was assigned in [a Jesuit community college]. And in a sense, it was an administrative role also, but it was more as director of formation and finance, as treasurer. So, in a way, that prepared me [and] oriented me towards a bigger responsibility. So, excitement generated from being able to apply what I learned and what I would have wanted to do, where I'm given the opportunity to do it.

Though Fr. Robert's initial reaction may be starkly different from the rest, what remained problematic was the immediacy of the assignment that did not allow for much time for additional leadership preparation in the context of the mission schools. Nonetheless, faithful to their vocation, all the participants accepted their new assignments as part of their vocation.

**Responding promptly to the call.** Despite the participants initial surprise, they all took on their new assignment as their response to the greater call of the Jesuit mission.

Fr. Isaac figured that there was not much choice but to bite the bullet because "no one else will do it . . . and the school will be in a much worse situation, if no one would take on this leadership or managerial position."

Fr. Thomas pensively shared how he overcame the initial disbelief in his new assignment as a newly ordained Jesuit priest, "I was surprised because I don't have any background regarding agriculture. I haven't even planted anything [in my life]!" He soon realized however that without any Jesuit leading the institution, the school might fold, and so he persuaded himself to "take that risk rather than closing that institution."

Fr. Aloysius was able to transcend his initial disinclination to lead a mission high school when he came to a conviction that he could eventually develop the skills needed to serve effectively in his assignment: "I've been assigned to do [it]. I have to deliver, and I tried what I could. In those striving, in those trying, I [got] to learn."

Fr. Aloysius also emphasized the value of being an unencumbered Jesuit; someone who is free to go where there is a great need for him. He spoke of the Jesuit characteristic of disponibility: “Part of our Jesuit identity [is] to be ready for anything . . . that has been in our tradition. Wherever there’s a need, then we are always [ready to go, and we] have to be available for the mission.”

It was clear that despite the initial reluctance in most of the participants, the assignment given to them by the provincial superior was a mission that they needed to embrace as integral to their Jesuit priestly vocation.

### **Coping with the New Assignment: From the Mundane to the Spiritual**

Accepting the leadership responsibility, however, did not mean that they would be free of struggles in their early period of school administration. Indeed, the opposite was true as they tried to figure out what was expected of them as school directors in the mission high school setting while juggling multiple tasks as pastors and administrators.

**Defining their responsibilities as school directors.** Although there was nothing in writing that explicitly stated the main duties and responsibilities of a school director in the mission schools, all the participants agreed that a school director plays a crucial role in their respective institutions. They identified their key functions as leaders in their schools through the pre-interview questionnaires and elaborated on some of them in the interviews.

Fr. John said that the school director has to be familiar with the operations of the school as an organization. For him, that meant being knowledgeable with the school’s financial systems in order to secure its operational viability. On top of this, a school director, for Fr. John, had to be the link of their school to the “other institutions, benefactors, organizations, resource

persons,” who could help them in their work. Fr. Isaac had a similar understanding of his primary organizational responsibilities as a school director. He classified a main chunk of his duties as “people management” in terms of professional development of teachers and administrative staff. He also saw his responsibility as the chief fundraiser of the school and the person in charge of resource allocation, including the planning and execution of infrastructure development. Finally, he believed that, as the school director, it was also his responsibility to create effective programs to keep their students in school due to the distinct high drop-out rate that they were experiencing in St. Rita’s when he started his term.

On his part, Fr. Thomas spoke about the responsibility of a school director from a strategic point of view, saying that as the head of the educational institution he must constantly be assessing the school’s situation (i.e., identifying challenges, problems, strengths and weaknesses, and opportunities for growth) with “creativity and innovation, resourcefulness” in order to serve its students well.

Fr. Aloysius, Fr. Paul, and Fr. Robert saw that the primary responsibility of a school director was precisely what their job-title asked of them—to direct the school. This generally meant that the school leader had to be in charge of human resource management and development as well as the formation of the school’s stakeholders (particularly that of the students and faculty but possibly of the alumni and parents as well). Fr. Paul also mentioned that a school director needs to “set the future of the school,” ensuring that the mission school remains viable and sustainable. Fr. Robert added that a school director must also promote the Ignatian “way of proceeding in education,” given that the mission schools are Jesuit-led.



Fr. Joseph gave a succinct summary of the roles of a Jesuit priest serving as a school director in the SPMD mission schools. He said that a Jesuit school director must be (a) a teacher of teachers who models to and inspires in the faculty and staff the Ignatian and Catholic values and priorities of the institution, (b) an asset manager who also makes sure the institution has enough resources to deliver its services to its students as he is able to plan and implement continuous improvements, and (c) a companion in the journey who intimately knows “the demands of the school . . . and is able to journey with his teachers for them to achieve the school goals . . . a morale booster not just a demanding boss.”

As they navigated their way through what was expected of them as first-time school directors, the participants in this study struggled during the early part of their leadership terms. Most of the participants felt inundated with multiple responsibilities that constantly demanded their attention. A number of them also had some challenges in balancing their roles as pastors and administrators. Ultimately, to stay afloat, they had to learn on the job quickly and figure out for themselves what it meant to be a school leader in the margins.

**Juggling multiple tasks.** Fr. Isaac felt that the designation “school director” was a very “fancy title” and did not really reflect the complexity of the work it entailed in the context of a rural mission high school. He then enumerated what he had to deal with as he jump-started his leadership journey in St. Rita’s, “I came during the time when so many things were needed to be addressed in the school like for example, decaying classrooms, no covered court (gym), and the teachers are leaving because of greener pastures somewhere else.”

Fr. Paul and Fr. John echoed Fr. Isaac’s sentiments as they recalled how they had to instantly put on several hats when they started their work. Fr. John expressed his frustration in

between chuckles during the focus group discussion, “So it was difficult (slightly shakes his head). I felt that there was really a big, big task that was dumped, that was passed [on] to me, unexpectedly (faintly smirks) and I had to address many tasks almost simultaneously.” Others in the group discussion nodded in agreement.

Fr. Paul was juggling several jobs which were all new to him. Not only was he school director, he was also the assistant parish priest, IP student dorm prefect, and coordinator for mission schools in SPMD. Almost sounding sarcastic during this part of the interview, he added that he even had to be a “part-time cook” in their convent. It was not surprising then that Fr. Paul felt swamped by work during his short two-year stint as school director of St. Francis’ High School. Fr. Paul lamented how taking on and learning all these “new jobs” at such a short time was very frustrating.

Fr. Isaac also felt the stress of “climbing the steep learning curve.” What made matters more challenging for him was how he felt isolated from anyone who could support him at the start of his term:

I am overwhelmed by the tasks . . . there’s so many things that [I] have to learn, for the first time like balancing financial statements, like drafting contract for the teachers, contracting services of a builder, and buying supplies, so on and so forth. . . It’s overwhelming, because that place [St. Rita’s] is cut off from communication. So, if I needed to [immediately] ask someone about how to run things, I couldn’t because we have no cell phone signal.

**Balancing the pastor-administrator persona.** Being isolated was not just a literal concern. Fr. Aloysius felt that being a priest and at the same time a school administrator advocating for school reforms also separated him from the same people whom he wished to nurture spiritually as the pastor in their village. He narrated, “They will think: ‘You’re a priest

[and yet] you don't understand them.' You know that's the difficult job of putting up different hats. So, when are you going to be a priest? When are you going to be an administrator?"

Fr. Aloysius further recounted that the tension even led to a rift between him and some members of the school community: "[S]ome teachers already went to [the SPMD local superior] There's one religious sister (living in the parish) who accompanied them to air out their grievances against me . . . and many were already intending to resign."

For his part, Fr. Isaac, felt this tension between his role as pastor and administrator as an internal struggle. He believed that he was more prepared and inclined to lead as a pastor than as the top school official.

So, it's like when I assumed being parish priest of Pamplona, I was really in my elements. The meetings were life-giving. I believe like, I can run it like I've been a parish priest before. But, [as] I compare that with the meetings that I have with the school, it's so painful, both for me and for the others. And I was looking at it. "I'm the same person!" I'm a Jesuit missionary, but wearing two different hats. Why is it that when I do a PPC (Parish pastoral council) meeting, people are alive and want to attend? The other (school meeting) is like painful, because it involves some decisions, painful decisions [about the school].

Fr. Isaac, in the end, resolved to simply grin and bear it, consoling himself with the thought that his Jesuit superior was probably doing the right thing in missioning him to St. Rita's, "I'm the only one assigned . . . I would think the provincial knew what he was thinking when he assigned me here, so I just have to make do."

### **Facing the Problems Head-on**

To make do for most of the participants meant they had to hit the ground running despite their limited personal and institutional resources. However, before they could proceed with their envisioned reforms, they had to identify and face head-on their respective school's problems and eventually come up on their own with solutions, albeit short-term at times.

**Human resources.** Fr. Paul thought that the school woes boiled down to deep-rooted issues on human capital: “The greatest deficiency in St. Francis’ HS is human resources—at all levels. Even getting someone to competently work on the plumbing is a struggle! As director, I was not ready for this role and that seemed really unfair to the mission.”

Fr. Paul also revealed what he had discovered as professional qualification deficiencies of some of his key school personnel: (a) a lay principal who had been in the school for decades still lacked “credentials and the leadership qualities essential for her work,” (b) a religious sister acting as the finance officer had serious “psychological issues” that affected her relationships with the staff, and (c) ill-equipped instructors who stayed only because “they had nowhere else to go.” Fr. Paul sighed, “It’s hard to train future leaders this way; so, you are stuck with the same people who don’t seem to have the energy to change the status quo.”

**Financial resources.** Fr. Thomas saw the school’s troubles were a result of the bigger social issue of rural poverty. He observed that during his term, most families could not afford to pay their children’s tuition despite the subsidies offered by the school and the government. There was also the perennial threat of losing qualified teachers who would transfer to higher paying jobs in public schools. Fr. Thomas stated, “[T]he challenge was, of course, how to run the operations well, given the lack of resources.”

As if not knowing where to look for funds in a poverty-stricken locality was not enough a problem, some of the respondents also bemoaned the lack of financial systems and accountability that had drastic effects on their already depleted resources.

**Organizational and financial systems.** Fr. John pointed out that as he took over the post from the former school director, the religious sister who was in charge of the school’s finances

was also replaced by someone who, like him, lacked experience and expertise. Fr. John recalled, “[Had] the [new sister been] very knowledgeable, I would have felt more confident [because] she can explain [the procedures] to me . . . in terms of financial support and funding.” However, as it was the case, Fr. John and the new finance officer felt that both of them were left in the dark, not “knowing how things will run.”

Fr. Aloysius identified a similar problem in running the school finances on his first year as director. He discovered past complaints from parents who paid for their children’s school uniforms, which they never received. Much to his dismay, the school records were in such disarray that he could not even determine where to begin his inquiry, “the record of the finances, it’s all confused. I couldn’t figure out the beginning and the end of the finances. And it’s like anyone could receive money and release this receipt.”

**Safeguards for student care.** But the controversies were not limited to the schools’ finances. Fr. Joseph had to deal with an even graver situation. The religious sisters who were running the day to day operations of St. Dominic’s had been accused by a volunteer teacher of forcing some students to work long hours in exchange for their scholarships. Fr. Joseph recalled how he had to face this issue as soon as he received his school assignment:

The labor or child abuse case . . . was placed on my lap when I took over. It was painful since I had to deal with issues of the previous administration and with the current management in how systems and protocols were not followed. The pains of dealing with vulnerable adults who were placed in a situation that was not ideal, and, an administration, who also [did] not know any better, exploited them. It was painful since it was not only a simple HR issue, there were both internal and external threats. Internal, parties concerned threatened to resign and leave important posts. External, lawyers were poised to bring it to court if matters were not settled.

## **Learning on the Fly**

Confronting tough and systemic challenges at the start of their leadership term was exasperating for the participants, especially when the transition between incoming and outgoing school directors did not provide much time for turnovers or simply easing into the job. Nonetheless, they were all determined not to surrender, and instead trudged forward by learning on the job as quickly as they can.

**Trial and error.** Fr. Robert, Fr. John, and Fr. Isaac recognized that often times, learning came from reflecting on their past mistakes and simply resolving to try a little bit better next time. “I cannot do worse than what’s already there. I can only go up,” Fr. Isaac shared in the focus group discussion. He then added, “[S]o the first year, in other words, it was just me inventing or trying things out. And like the two of them [referring to Fr. Robert and Fr. John], I committed a lot of mistakes.”

Fr. Aloysius affirmed what Fr. Isaac had said. He held that a Jesuit assigned to any mission should not just have beneficence in his mind and charity in his heart but must actually possess significant capabilities to initiate changes—capacities that he was willing to learn even through trial and error for the sake of their educational ministry, “I have good intentions, but when [it comes to] managing [schools], [one] does not only count [on] good intentions. You really have to know—to be competent in certain areas.”

**Broadening critical consciousness through reflection.** True to their Jesuit character, most of the school directors were very reflective and spiritual. Thus, despite their initial surprise about their assignment, little turn-over from their predecessors, and unclear job descriptions, the participants were able to ground their personal contexts and Jesuit vocation vis-à-vis the realities

of the mission schools as they attempted to gain the proper disposition and enough knowledge and skills to lead their respective schools for the underserved.

***Beginning with the self.*** Fr. Isaac candidly admitted during the interview that a big part of the leadership role dealt with understanding first one's capacity to affect the lives of the people in the school community:

This assignment could be just a year or two or three at most. And even if I am able to craft policies, create systems, and improve services, if I somehow, you know, the word is "destroy people," then I'm not really building communities and I am not contributing to the improvement of that particular mission area.

Because of their seminary formation in Christian ethics and self-reflection, it was quite natural for most participants to thoughtfully tap into their critical awareness and recognize the socio-cultural concerns that affected their communities. Fr. Paul, for instance, admitted to his tendency to remain within his comfort-zone, "You tend to stick to where you are comfortable. I was more successful with benefactors and other collaborators instead." Fr. Paul would eventually realize that there was definitely a need to step out of what was tried and tested when it came to dealing with his staff and initiating for school-wide reforms. Fr. Paul admitted, "I could have done a better job of working with others, tapping their potentials, and trusting their abilities."

***Finding their reason to be.*** The school directors in their deepening immersion into their schools' contexts became very much aware too of the socio-historical reasons why their mission schools were established decades back and why they need to continue to be relevant today. Fr. Robert, for example reiterated St. Dominic's High School's *raison d'être*:

[In] a very real sense, I think [this school] aligns well with the UAP (Universal Apostolic Preferences of the Society of Jesus).<sup>9</sup> About 70 to 80% of our students are actually poor, and sons, daughters of tenants or paid farmers. And even that is enough reason to continue. But then secondly, this is [a locality] where the land, the soil is really rich. And we know that [this place] even with such rich soil is the fifth poorest province in the country. And St. Dominic's has about 20 hectares of farmland purposely donated to promote [sustainable] agriculture. And realizing the vision of the benefactor right here in [this town], especially at this time when young students no longer prioritize agriculture, maintaining St. Dominic's would be countercultural, but at the same time, beneficial to improve the lives of people and to promote agriculture as well.

In his interview, Fr. Thomas emphasized the distinctive notion of providing quality Catholic education in an area where school standards have been conspicuously low. The Jesuit mission high schools, according to Fr. Thomas should offer an alternative to the public school system in this part of the country by providing excellent Catholic formation and robust academic instruction, “[These are] important [goals] as part of being a mission school . . . to offer an alternative to parents and to students that they can receive quality Catholic education, even if they're far from the cities, or far from the [big] Jesuit institutions.”

Fr. Joseph acknowledged, too, that the students' holistic formation within the Christian purview was what mission schools, such as St. Dominic's could uniquely offer to their communities: “this is something that we are able to insert in a very clear manner in terms of our instruction to the students—the human formation side of things.”

Fr. Aloysius reiterated that the mission schools serve more than the practical purpose of accommodating students who are not reached by the state through the public school system. With an appreciation of the social milieu in his community, Fr. Aloysius realized what truly

<sup>9</sup> (a) Showing the way to God through St. Ignatius' Spiritual Exercise, (b) walking with the poor and excluded in a mission of reconciliation and justice, (c) accompanying young people to a hope-filled future, and (d) caring and protecting God's creation (Sosa, 2019)



mattered in the mission schools, such as St. Mark's was their potential to distinctively educate students from the perspective of faith and justice. He then stressed that, "no one [else] will offer that in this far-flung place." He also added, "side by side with [Christian formation] is really the academic instruction. Student instruction. And it's very, very important."

*Paying attention to the other.* Among those whom school directors had identified as being in great need of formation and improved instruction were the poorest among the poor students, those who came from IP communities (i.e., *Lumad*).

Fr. Joseph noted that this, ironically, was not an easy shift in the school community's ethos.

[I observed that indigenous culture] was looked down in our [school], for example, the cultural presentations, which is very normal in Pamplona, Barcelona, and Azpatia as part of their lives, [but] for [our school], it's being looked down [upon]. And so, even the IP's would not identify themselves [as IP's], or show their cultural heritage. Because the mainstream was just too much. [The IP students were being] labeled, "*taga-bukid*," you know, that is, "from the mountains." And so, this derogatory term! It took some time until they . . . the teachers, and some students were able to showcase [their culture]. Showcasing their dances . . . was not easily . . . appreciated [before] . . . Because of the overwhelming lowlanders who are there [in the school].

Fr. Aloysius observed a similar phenomenon, "usually, if I listen to how some public-school teachers or a few parishioners talk, the *Lumad* are looked down [upon]." Fr. Aloysius would then reflect on the role of the school in addressing this social discrimination:

[Unless they attend our school], you will not be able to meet these [IP] students and will not be able to interact with them, at least to make them think of their situation. [Through our school], they will [realize that they should] not just become a victim of this marginalization but can resist the culture to be dominated . . . by the bigger population [who] will dominate the smaller . . . the minority group. So, in the school, we have to tackle that. We cannot put them aside. It becomes like a center, a central point in our talking of our faith, of our values . . . why we are here; what we are here for.

Fr. Paul upheld this prioritization of the needs of the IP students in their school, “providing opportunities for the least and last—there are resentments from others about our preferential support to the *Lumads*, but they are exactly [the reason] why we (mission schools) are still here.”

In order to reach this level of critical consciousness, it was important for the school directors to move beyond the minimalist mode of simply passing the Department of Education’s certification requirements to obtain subsidies for the school or just handing-out dole outs to indigent students. As Fr. Isaac shared in his interview: “[I]f this is the mode [of our operation then], we haven’t really touched on the very core reality that our students [in St. Rita’s], 85% of them are *Lumads* or natives.”

Outgoing school director, Fr. Paul spoke similarly, “We are still new at [providing spiritual and cultural formation to the IP’s but the [mission] district is more conscious now of creating a common formation program for its [IP] scholars.” One of the ways by which the school directors have learned to broaden their critical awareness on this social matter was to collaborate with the “experts,” who do not objectify the IP students and their communities as mere recipients of charity but as active stakeholders in their own growth and development in the school. Fr. Paul explained, “[W]e want to work with and learn from others who have more experience and know-how when it comes to the IP culture”<sup>10</sup>.

**Developing contextualized leadership knowledge and competency.** With a growing understanding that was now nuanced by their encounters and experiences of their mission

<sup>10</sup> College and primary schools in the Southern Philippines which are both specifically founded to educate IP students

schools' unique context, the school directors learned to practice informed leadership. They acquired the basic aptitude to appreciate, communicate, and enact data-informed decisions that could shape and support their goals to make the high-needs mission schools supportive of diverse learners and capable educators.

*Caring for students' inclusive learning and culture.* Fr. Isaac gained an interesting insight on student absences and completion rates by contextualizing the school system within the bigger reality of the agricultural community of which they were part. He recounted:

I have had to grapple with the idea that towards the end of our school year we have lost some 30% of our students due to drop out cases. This was despite the fact that our mission school had [only] minimal fee [so that] students could afford the matriculation. These [drop-outs] were not students who fared badly at school either. They simply no longer wished to enroll in the next school year. I found out that most of the students were asked by their parents to help out in harvesting of crops. That they would receive an amount ranging from PhP100 to PhP150 [\$1.92 to \$2.87] per day if they could help. And since harvests are seasonal, many would deliberately be absent for several days. When they could no longer catch up with the lessons, they get embarrassed, a very common trait among *Lumads*, and they would rather be totally left behind than continue studying.

Thus, Fr. Isaac worked very closely with his fellow administrators and teachers. They spoke with parents in various meetings and developed a plan of action which included offering additional incentives of free school supplies or tuition fee discounts for students with perfect quarterly attendance. They even rescheduled their annual intramurals, a much-anticipated event by the students and the village, from October (i.e., common harvest season) to February “to make the students stay longer in school and actually finish their grade level.”

Some of the innovations that a number of the school directors introduced or at least spoke about had a direct impact on the students' learning. A prime example of this is how some schools

have implemented the Dynamic Learning Program (DLP)<sup>11</sup> as their chief instructional methodology.

Fr. Thomas mentioned that although this entailed more preparation for the teachers and classroom work for the students, it was a helpful instructional style that allowed for better faculty collaboration through team teaching and student participation by learning through supervised activities. Moreover, as what Fr. Joseph pointed out, not only was DLP in line with the Ignatian Pedagogical Paradigm (IPP), which placed a lot of emphasis on the cycle of experience-reflection-action as an instructional methodology, it also allowed for the parents' easy supervision of their children's learning through a portfolio that monitored their growth: "And so, at the end of the day, it's clear . . . how much learning they get from it 'no? There is something that they're able to produce as the work of the students."

To complement initiatives on student instruction, it was important that the school directors recognize and address concerns about unhealthy school cultures. Fr. Aloysius, for instance had to put his foot down in terms of implementing school order among students and teachers. He witnessed in his first year how pupils and faculty alike were unmindful of prioritizing schoolwork, "[The students] can come and go anytime . . . and they can go home, pick up their projects. [If] someone would call [out to] them . . . they can [just] go [out] to the street. They can go anytime, even in the middle [of the] class!"

<sup>11</sup> "Dynamic Learning Program (DLP) is an educational model centered on activity-based multi-domain learning. It requires students to work independently. The students are not given any assignment for them to work at home giving them ample time to rest and to spend time with their family." (Rances, 2010, p. 3)

Fr. Paul also mentioned that there was a need for their school to break free from their set ways, “It’s been difficult to introduce change in an institution that’s always done everything the same way. I learned to challenge them by offering alternatives.” Fr. Paul gave as an example his introduction of alternative classes to replace the usual “song and dance program” that teachers and administrators would stage to celebrate the school’s annual Foundation Day. This, meant, however that he had to “take the lead in the preparations and do most of the work.”

*Caring for the teachers’ wellbeing and formation.* To really improve student instruction, the school directors had to understand and address serious concerns about the professional development of their faculty. To gain this knowledge, Fr. Robert and Fr. Joseph had regular conversations with their teachers in their school. In fact, it was on one of those occasions that Fr. Robert had an epiphany on how he would need to find ways to care better for their teachers in order to improve their students’ learning: “I began by listening to their [teachers’] stories. And in the process of listening to them, you sense the vision that they have for the school, in fact, that I think, actually challenged me . . . that I have to do something.”

Fr. Thomas acceded and underlined the value of relating well with the faculty and staff, given that they have sacrificed a lot to remain in a mission school that paid only a fraction of what they would have gotten if they had transferred to other public institutions. During his term, he learned to find ways to provide “other things that the government cannot provide. And of course, these are non-financial benefits, things like [professional development and spiritual formation].”

Fr. John was very supportive of this initiative as well. After gaining a foothold on his educational administrative functions during his first year, he then made sure that their lay

principal would have opportunities for professional development by supporting her doctoral studies at a Jesuit university in Northern Mindanao. Fr. John saw to it that she felt affirmed and encouraged in her administrative journey not just by providing for training allowances but by expressing his faith in her, “I think, *sa akin* (to me) it’s the trust that I give her . . . *kasi* (because) I see *naman* (really) her dedication, her hard work. So, I think that trust that I give her encourages her.”

Fr. Paul expressed the same thoughts, “I hope that this also means forming [the lay faculty and administrators] not just professionally but also spiritually. We hope they’d stay and help the mission be sustainable. But even if they go, their own training might also have a multiplier effect elsewhere.”

**Practicing compassionate leadership commitment and skills.** As they increasingly developed their proper disposition and critical awareness as well as the contextual knowledge of what it took for the school communities to move towards their vision of inclusive quality Catholic education in their localities, the school directors recognized their need to acquire and exercise apostolic leadership and managerial skills.

***Assessing their organizational weaknesses.*** School operations was an area of improvement for all. Fr. Aloysius noted that it was normal for first-time directors to feel frustrated “because [they] can see the vision, what [they] want, but [they have to figure out how exactly they would] bring the whole community there, [and value] the same thing.” Fr. Aloysius then added that what made matters even more complicated was that our schools were not designed to be highly efficient companies in the “corporate world” where “everything is set up. Here [in the mission schools], you are [still] gently setting [the systems] up.”

Fr. Paul of St. Francis' was blunter with his observation, criticizing how systems were practically not in place and how the "school is highly unprofessional." He recognized that "with a growing student population and stricter DepEd requirements, we just cannot do things the same way," as when the schools were founded by early missionaries decades ago.

*Advancing apostolic leadership.* In the course of my interviews with the school directors, several felt that they needed to develop specific skills to be effective apostolic leaders or mission oriented and driven Jesuit leaders who are able to inspire their school community and other individuals and institutions to work for the growth and sustainability of their educational ministry. One of the skills related to this was their ability to communicate and sustain the Catholic and Jesuit educational vision and mission to broad and diverse publics.

Fr. Thomas, for instance, had shared his experience in addressing the need for more scholarship grants for their indigent students by learning to deal directly with government officials. Fr. Thomas explained that as he was able to build good rapport with the regional head of the Technical Education and Skills Development Authority (TESDA), the government agency in charge of supporting nationwide vocational training, he was also able to secure more than enough scholarship allotments that allowed him to accept more students and generate enough funds for some improvements in the school's agricultural facilities.

Interpersonal skills that emphasized community building were also proficiencies honed by the school directors during their terms. Fr. Robert would share for instance how he took the effort to speak to each faculty members regularly in order to get a "feel of where the school is relationship-wise [and] business-wise," so that he can decide and "act accordingly."

In a similar manner, Fr. Paul found it beneficial to make use of his capacity to reach out to like-minded individuals who were willing to assist him in improving their mission school.

I really enjoyed getting other people involved in the mission. And I don't mean just benefactors but people who can share their time, skills, and their stories. We've had film and documentary makers, a former Arvisu candidate<sup>12</sup>, Ateneans and Lasallians<sup>13</sup>, and Jesuits. This also includes bringing in last year's JVP<sup>14</sup> and Vianney seminarian<sup>15</sup>, both of whom did very well. I guess when your problem is human resources, you address it temporarily by bringing in good people.

For a newly ordained Jesuit, one of the most demanding tasks of a school director was to make sure that he was able to raise sufficient funds and other resources for all the needs of the school. Thus, the school directors, after gaining a better sense of their responsibilities in their high-needs schools had to learn to tap into their social capital as Jesuits for this purpose.

Fr. Thomas acknowledged that one of the first things that he did to help the IP students was to provide a decent housing for them. That necessitated asking help from the Philippine Jesuit Aid Association. Fr. Paul also mentioned that he needed to learn to seek assistance from Jesuit universities and basic education units. As he visited these more established educational institutions, he tried to learn from their communities by soliciting their ideas. Sometimes, the Jesuit social capital can extend beyond the Philippines. Fr. Robert, shared for instance, how a US-based alumnus of a Philippine Jesuit university had reached out to St. Dominic's upon the request of a provincial superior. The retired professional has helped Fr. Robert oversee the agri-social enterprise of the school. He has been opening doors for St. Dominic's in terms of connecting the school to various markets for their school's farm produce. Fr. Robert would

<sup>12</sup> Someone who was discerning Jesuit life through the candidacy formation program

<sup>13</sup> Alumni of rival schools run by the Jesuits (Ateneo) and the Christian Brothers (La Salle)

<sup>14</sup> Jesuit Volunteer Philippines-lay volunteer corps that serve in marginalized communities as teachers, community organizers, formators, etc.

<sup>15</sup> A diocesan seminarian in Northern Mindanao



describe him as “an additional head” in fulfilling the mission of St. Dominic’s as an agricultural center of learning for secondary students in their area.

***Effective site-based school management.*** In tandem with apostolic leadership is effectual and efficient site-based school management. Operationally, this meant that the Jesuit leader, working collaboratively with his lay colleagues, must gain and exercise skills related to the administrative and financial school processes. Likewise, a school director must acquire the capacity to work with the board of trustees and build and lead a team in their schools to effectively share power and delegate responsibilities to others.

A number of school directors voiced their need to learn even some of the most basic school management skills to lead the schools effectively. Fr. Robert admitted that despite his extensive experience during regency, he was still unsure of the “ins and outs of running the school.” He lamented:

I don’t know what the purpose of the [school’s] BOT [Board of Trustees] is; how the BOT operates, which decisions should be raised to the BOT and in a way because we, the principal [a religious sister] and I, came in [new] together, so even the delineation between what the principal does and what the director does [needed clarity]. So, these things [I learned along the way by asking people], and some, I learned the hard way, making mistakes along the way.

Fr. Paul, for his part, related an interesting story that illustrated his “accidental” skill acquisition in identifying the right personnel for a specific need in his school.

There’s this one time . . . we needed another teacher because somebody had left in the middle of the semester. And we needed the teacher desperately, and [the principal] had asked one of the people in the neighborhood to apply for a teaching position. And [the applicant] had no teaching experience whatsoever. And so, during the [classroom teaching demonstration], she did a very bad job. I wasn’t there, but the volunteer [personnel] was telling [me that], it is so bad, there is no way that she could teach given her current set of skills. But then, unfortunately, the principal was insisting that she could be taught by her. So, when it was my time to interview [the applicant], I asked her how her demo went. She admitted that it was bad. But then again, she had been a *barangay*

(village) secretary for many years. And then just there, we were able to [decide to accept her] . . . “Okay, since we [also] need somebody who’s an admin person who doesn’t have to face a lot of students as a teacher but can work maybe as an assistant registrar or librarian.” And [so] that’s what she got. Her face lit up when I offered her [the librarian position]. And she said, “Yes, I could do that!” There was this need at that time, and so when the situation arose, we were able to solve . . . hit two birds with one stone!

Fr. Paul would eventually recruit a more qualified volunteer to temporarily fill-in the teaching position.

Fr. Isaac, for his part, reiterated the need to make sure that the school director was able to generate and allocate resources effectively for the operations of the school. He was awakened to the stark reality that they would not have a mission school to speak of if they do not even have the operational funds to pay their teachers and staff adequately and promptly. He confessed that he had sleepless nights “trying to balance a shoe-string budget and worrying where [he] will get the next month’s salary for teachers because construction of a school covered court (gym) and much-needed [restrooms] are underway and could no longer be postponed.”

### **Some Good News: Counting their Blessings**

The stories of the mission high school directors were not entirely grim. The Jesuit leaders had also shared their successes amidst their challenging contexts and have identified their lay-colleagues, generous benefactors, and ultimately God in bringing about these blessings.

**Journeying with the IP students.** For Fr. John and Fr. Thomas, one of their early victories was about journeying with and providing for the needs of all students, most especially those who come from the underserved IP communities. Fr. John narrated how he frequently reminded their school community that poverty should not be an excuse for students not to have access to good education. Thus, he supervised the building of a school dormitory for IP students

living in “far-off barrios” so that they do not need to walk for hours just to get to the school each day.

Fr. Thomas also felt that having a suitable residence for IP students was integral to their holistic education:

How can they study well given that condition (poor living conditions)? It’s important to have at least a decent place to live, and at the same time, a place where they can be easily monitored, because it was built in a way that there’s someone who would look after their needs, who would, kind of, follow up if they’re studying, and things like that. So, that’s part of the objective because there were also experiences in the past, wherein, some of the [IP] scholars will drop out. Well, because for one, they can’t cope . . . with you know the rigors of studies. Perhaps because the conditions that they’re in were not suitable to study well, and so I think it’s important to have that [dorm].

As we toured their campus during my on-site observation, Fr. John also spoke about one of their school’s newest buildings—a cultural heritage house. He dreamt of using this space “to put up an exhibit showcasing their [Indigenous People’s] culture, the *Talaandig* (tribe) culture and encourage them to appreciate their dances, poetry, singing.” He was a staunch believer that by building such a structure, their school could do its part to sustain and strengthen the *Talaandig* heritage. To further support this endeavor, he was hiring a new teacher with a specialized background on indigenous culture, “She’s a graduate of an institute for IP education. She was involved in setting up cultural programs there. She’s [now] going to help set-up our own program in our school.”

**Engaging the larger community.** Like Fr. John, Fr. Aloysius was seeing the role of the school in addressing a bigger social issue in their community such as peace and order among warring tribes. He creatively started this movement by inviting the local *Datus*, or the tribal chieftains to go to their school and perform rituals for peace. He stated that this could be a significant start for the IP’s to consider the school, as a place of peace: “That if there are

conflicts, it should not be in the school. This is a safe place. The school should be a place where they can reconcile conflicts or settle their differences.”

Fr. Aloysius recognized “that the culture’s still evolving in the school, in terms of how accepting we are [of the IP heritage] . . . there’s still so much that can be done.” To him, however, this was a creative first step to a more inclusive and peace-loving school community.

“Problem-solving in the school also requires a lot of creativity,” as Fr. Paul reflected. He spoke about this in the context of how he was able to address “a serious case of class bullying in senior HS,” not by punitive suspensions but “with sanctions that were appropriate but also restorative.” This was something new to the school community and to the larger population as well.

These examples marked an important recognition of the schools’ role as catalysts for social change. Fr. Thomas asserted that “one effect of being a Catholic Christian school, or a Jesuit-run school is the emphasis towards social transformation, to be agents of transformation.” Fr. Thomas emphasized that, “One of the barometers of success is that not only how we transform students to become a better person, a better Christian, but also to become agents of transformation in the communities that they’re serving or where they’re in.”

Fr. Robert substantiated this claim with a poignant anecdote from his school:

We just learned that one of our [indigent] students found a wallet [outside St. Dominic’s campus], and, in fact, asked his father to contact the person written on the identification card to return everything and he was commended for it. It makes all the effort [we do in the school] worth it.

**Collaborating with others.** As the school directors celebrate their efforts, they humbly acknowledged too that they would not have weathered through their first years as novice school directors without the support that they had received from various individuals and groups.

***Lay-companions-in-mission.*** Fr. Robert, Fr. John, and Fr. Isaac all spoke about the inspiration that they have obtained from their lay colleagues. Fr. Robert recalled:

To me it's working with teachers and feeling and witnessing the passion that they've poured into what they do, given that they're not paid commensurate. . . . It compels, impels me to actually also give what I can. It's the most life giving for me. What makes it (working in the school) even more inspiring is the fact that a number of our teachers were our former students who came back just to teach, [despite] knowing that it's not that financially rewarding. And the other thing with them [teachers] is how they even loan money or give money for food for their students. So, you really sense the sharing of the mission.

Fr. John affirmed what Fr. Robert had shared, on how the Jesuits' lay partners have truly taken the mission unreservedly. Strengthened by this, he began to "see the work as collaborative, rather than just [his] own effort."

Fr. Isaac, on his part recollected how one of their teachers already had a job offer at a higher paying institution but still decided to stay "because she believed that God will provide a way as the school and Jesuit missionaries have been so kind to her." Fr. Isaac also indicated that this teacher's daughter who was once a student of St. Rita's has also joined her mother and became part of the faculty in the school.

***The SPMD brotherhood.*** Inspiration and support for the difficult educational ministry in the mission schools also came from fellow Jesuits within the Southern Philippine Mission District (SPMD). Fr. Isaac specifically spoke about the concern that he felt from their former local superior:

He (superior) would constantly ask what you needed there, and he would supply persons whom to contact. And I felt like he was confident enough for me to run that school even [though for] myself, I don't have that confidence. I will just tell him, "this is what happened." And then we will talk about the situation. And when I returned (to the school from the mission headquarters), I would have this new-found energy . . . I [can] continue because I felt someone . . . in our headquarters was listening and actually knew what was happening there in [the isolated village].

Similarly, Fr. John spoke about the Jesuit community structure of gathering weekly at the mission district's headquarters as salvific for him, "So, in a way, being here, it's like having a clear mind, even for just awhile. . . . You have people to listen to what's going on in your community [and] mission, also to your struggles and joys . . . so that helped for me."

Fr. Robert added to this reflection his own sentiments about community members who even though may not be able to give concrete solutions to his problems, were nonetheless ready to accompany him through his worries, "[E]ven the fact that sometimes there are problems that we cannot solve, and knowing that other schools are also experiencing that [similar concern] lightens the burden. It's just like misery loves company (laughter). But it's helpful."

***Benefactors and the Curia.*** Fr. John also recognized the support that came externally, "[T]he generous benefactors, they were really very helpful . . . and the support of the [Jesuit] province [head office/leadership] that we get . . . it may not be always in material or monetary assistance, but the support and the interest [in knowing] what's happening here [with us]."

**Relying ultimately on God.** Finally, realizing how at times the mission felt far too enormous and demanding, Fr. Aloysius emphasized how their spirituality was the ultimate saving grace for them.

Prayers, prayers helped a lot. There were times I would want to give up . . . to give up already. Because it seems that school's too stressful to manage. But yeah, really, to eventually present it to the Lord and surrender [the worries to him] and then [somehow, I would feel how] the Lord would help me deal with this, with that [problem]. Really, in a way I was helped by prayers.

### **Perceptions About the Leadership Formation of Jesuits**

From a description of the educational leadership experiences of the school directors, I now present how the participants perceived their formation in the Jesuit seminary to have

contributed in their leadership roles in the mission high schools. I will also include their thoughts on the seminary's formation curriculum, pedagogy, and evaluation processes which they felt could lead to marked improvement in the preparation of future school directors of mission high schools.

### **What was Helpful in the Jesuit Seminary for School Leadership Preparation**

All the participants went through at least 11 years of seminary formation before they were ordained to the priesthood and sent to lead mission high schools in the Southern Philippines. They recognized, how in general, the Jesuit scholasticate had been beneficial for their pastoral growth as missionaries who were available to serve the myriad needs of the local Church. A number of the participants admitted that there were specific stages of the Jesuit formation that were directly helpful in preparing them for their leadership roles in schools. A couple of the participants also recognized that it was their training and experience before becoming Jesuits that were truly relevant for their first educational leadership assignment in the missions.

**Disposition formation in the Jesuit seminary.** For some of the participants, forming the missionary spirit was key to the other aspects of preparing for leadership in the diverse Jesuit works. As Fr. Thomas pointed out, "there are various kinds of ministries where Jesuits are engaged in the Philippines." He felt that it was not only impractical to specifically prepare for each one of them during the seminary formation, but that it was just part of the formation tradition among the Jesuits in the country to take on a broad and generalist approach to preparing for future ministries. Moreover, he also opined that as missionaries, Jesuits are "sent," and so, do not get to choose, much less demand where they should work in the future. "You can't [just]

really prepare for a particular position, like, you can't say that, 'Okay, after ordination, I want to be this,'" Fr. Thomas explained.

Fr. Aloysius concurred with this notion as he recognized that the long Jesuit formation prepared him to imbibe the disposition of openness to "take on hard jobs, difficult jobs." It was those years of formation, according to Fr. Aloysius, that had oriented his missionary spirituality to be ready not only for a particular task but be genuinely available to be "missioned" anywhere there was need of him. Fr. Joseph, likewise, summed his experience of Jesuit seminary formation as a preparation to have the right disposition for his future mission, but any other specific skills to be effective in very particular ministries would simply have to be learned by the individual Jesuit "on the fly."

**Building and enhancing leadership skills.** The participants identified several stages of Jesuit formation that contributed to enhancing their leadership skills.

*Regency and Theology.* All of the participants identified regency as the most valuable and relevant stage of Jesuit formation when it came to preparing themselves for their leadership roles in the mission schools. Four out of the seven participants also included their theological formation as their response to this question.

*Regency.* All participants were once assigned to Jesuit schools in highly developed urban centers in the Philippines for at least a year. They found this stage of formation as very helpful because it was directly related to the educational ministry, and thus, allowed them to experience firsthand how it was to work in such an environment. Their regency assignments ranged from classroom teaching to part-time administrative works that permitted them to interact with students, parents, fellow Jesuits, and other lay colleagues.



*Theology.* The participants' theological formation was in urban Metro Manila. It involved both the academic training that they received at the Loyola School of Theology and the various part-time ministries, such as the "Sunday pastoral apostolates" that they performed along the way.

Reviewing the academic program of studies at the Loyola School of Theology (n.d.) for the seminary track, both the 2004 and the 2015 curricula, would show that the participants received instruction in (a) Biblical Theology, (b) Systematic Theology, (c) Historical Theology, (d) Moral Theology, (e) Sacramental Theology, (f) Spiritual-pastoral Theology, and (g) Missiology. None of these areas dealt specifically with leadership (e.g., educational leadership). The only courses that the participants had that were tangential to leadership preparation were the spiritual-pastoral theology courses on Pastoral Methods.

Fr. Robert indicated that their two classes on pastoral methods (i.e., Basic and Advanced) allowed him to hone his pastoral leadership capabilities. Moreover, he found that the seminary's Sunday pastoral apostolates—ministering to nearby urban poor communities for half a day on weekends—was an opportunity for him to apply his learnings from these classes. Fr. Robert, however, qualified that this learning might not apply to all because often, theological studies were assumed simply "as studies per se, without connecting it to your future ministries, and you do your apostolate as if you're [only] required to do it." He admitted that "some of us were not really managing our chapels [for the Sunday apostolates] the way we learned it from [our] pastoral methods [class], and still insisted to . . . do the way we wanted it."

*Other stages.* The participants also mentioned other stages of formation where they gained relevant knowledge and skills that helped them in their ministry in the mission schools.

Fr. Paul pointed out, for example, that the early exposures to the mission areas in the Southern Philippines during the novitiate years were quite useful in introducing him to these Jesuit apostolates in the peripheries.

Fr. Aloysius, for his part, spoke about his extra education courses, which he volunteered to take as electives during the Philosophy (first studies) stage of his formation. He testified to these classes' usefulness not just in his regency years (the stage after Philosophy) but even as a first-time school director in the missions:

During my Philosophy years I enrolled myself to [a] classroom management [course]. And I saw the value of that when I was already here (mission school). I could [make] comments [and] tell the teachers who are not doing well in classroom management. Why? Because I know, as an administrator, I can give constructive criticism as well as encouragement for teachers, and when I do that, I do it with greater [credibility].

All of the participants mentioned that the pre-service and in-service training in which they participated before they engaged in their actual regency school assignments were useful. These training programs would vary year by year. They would often be organized internally by the formators of the seminary in coordination with some administrators of Jesuit primary education units in Manila, such as Xavier High School in San Juan and Ateneo de Manila University High School in Quezon City. Each of the schools where a Jesuit regent was assigned would also have their short preparation programs for their new teachers before the school year began. Most of the participants attended these sessions, which included workshops on Ignatian Spirituality in Education and Ignatian Pedagogical Paradigm.

Five of the seven participants indicated in the pre-interview questionnaire that they also appreciated the training that was offered by the Ateneo de Manila University's Office of Mission and Identity and Development (OMIOD). This training was a requirement for the formands a

year or two after their novitiate formation. It was a two-cycle, week-long program designed and organized by the Jesuit university in Manila specifically for the Jesuit scholastics in their early stages of formation. Most of the participants who mentioned this as particularly helpful in their ordained ministry remembered how they learned here some of the basic skills in project management and human resource development. Fr. Joseph recalled how he strengthened his abilities in working with people of various personalities through these workshops:

[The OMIOD program] made you conscious of how you approach people, different kinds of people with different personalities, and different way of doing things. That [particular] session on “how to make a win-lose [situation] to a win-win situation” was helpful because the end [point of the activity] was always to attain a win-win [situation]. So how do you make sure that you bring them on board to what you want or where you want the institution to go?

**Pre-Jesuit training and experience.** All of the seven participants had an opportunity to earn at least a college degree and work professionally for a minimum of one year before they entered the Society of Jesus. A number of them mentioned that their pre-Jesuit training and experience as advantageous in their work as school directors.

Fr. Thomas, who took MBA courses and worked as a sales and marketing supervisor for a financial company before becoming a Jesuit, affirmed that his previous academic and employment background “helped a lot especially in the finance and admin aspects of the ministry.” Fr. Robert also gained much of his administration and management skills from his previous middle-management work experience at a multi-national company.

Fr. Joseph and Fr. Isaac, who both had teaching jobs before entering religious life, stated that these experiences allowed them to gain some confidence in working in school settings and with various groups of people. Fr. Joseph specified that previously working in another Catholic (but non-Jesuit) school for three years allowed him to be familiar with the educational system’s

“rhythm and demands.” Moreover, he said that this experience had “given [him] some baseline expectations of teachers and a holistic view of the role of education in our community and culture.” Similarly, Fr. Isaac said that his college degree and teaching job before becoming a Jesuit had given him some background on the humanities, particularly in the “soft sciences” (i.e., psychology, sociology, and anthropology) to deal with people, situations and cultures. “These subjects have helped me understand the context and uniqueness of the school setting I was involved in,” Fr. Isaac added.

Without a doubt, the participants affirmed the need to be prepared for their leadership roles in the mission schools. Through the long years of Jesuit formation, they have gained a missionary disposition as well as some general leadership skills which they felt tied them through their first assignments after ordination. However, as Fr. Aloysius pointed out, this should not be the ultimate standard to equip oneself for the real challenges of the mission. He shared in the interview:

Our formation has prepared us to have the disposition to be sent. But just to be sent? Where is [the training on how to do the work]? That’s the secondary question. Now, the second aspect, we are realizing that it is as important as the first. You realize that when you are [already] in the ministry. When you are in the pipeline (seminary), you don’t know [yet]. The formators will just give what they think you needed and what’s necessary. But when you are already in the ministry, there you would realize, “Oh, I could be helped in this area, or there must have been something that I should have done before [I was sent here].”

### **Areas for Improvement on Leadership Formation in the Jesuit Seminary**

Participants then looked back at their formation years and identified ways in which they could have been prepared better as first-time school directors in the mission schools. Even though they had listed several workshops and preparation programs that were directly helpful in their assignments as regents, they also saw the need for more intentional programs that allowed

them to learn through experiences in and exposures to the particular contexts and needs of the mission schools. Second, they also hoped for a better way of receiving apostolic guidance not just during their scholastic formation years, but also during their first term as young school leaders. Lastly, they thought it would have been better if, in the course of their seminary formation, their formators and local superiors had helped them to thoroughly monitor their leadership growth so that in dialogue with one another, they may have set more clearly the trajectory of their future apostolic engagements.

**Experiential and intentional pedagogy.** It was very apparent in our conversations that the participants had the appropriate disposition to respond promptly and diligently to the call of the mission. Some acknowledged, though, that “availability to be sent” was not always equivalent to preparedness for the mission.

***Early exposures to school administration.*** A number of the participants spoke of the value of regency formation, but they were also quick to add how they wished they had more exposure to school administration and not just classroom teaching. Fr. John suggested that it might have helped him if he had been acquainted more with “the administrative running . . . the ins and outs of the school.” He also mentioned that as a regent before, he could have already been exposed to school administration even with just him listening and taking notes during top organizational meetings or by shadowing the principal or other administrators when they made decisions for the institution. Exposure to the administrative aspect of the education apostolate, for Fr. John, would have been crucial to his leadership preparation.

***Intercultural exposure and learning.*** To emphasize the transformational value of experiential learning, Fr. John gave, as an example, his experience in joining the East Asia

Theological Encounter Program (EATEP) for Jesuit scholastics that allowed for an intercultural learning experience. It is a voluntary program run by the Jesuit Conference of Asia Pacific (JCAP) that guided the participants to interact with the different cultures in Southeast Asia through a summer term of immersions and reflections. He came out of the program with a greater appreciation of the different cultures in Asia and, consequently, a higher valuing too of the local *Talaandig* heritage or the particular indigenous culture when he arrived at their mission school as a newly ordained priest. Unfortunately, as Fr. John would note, this program was not made available for all Filipino Jesuits, probably because of its high cost.

***Contextualized pastoral methods courses.*** Similarly, the pastoral methods classes at the Loyola School of Theology had the potential to prepare Jesuits to be leaders in their future assignments. Fr. Isaac, however, pointed out that the context given by their professor in their class at that time was far different from what he would experience in the mission area several years after: “The class, I think, was not for the Philippine setting. Because the model used was for parishes in the US and I suspect not Catholic parishes.” Fr. Isaac had hoped that the professor had reflected more on what his students would really need when they finally reach their places of assignments:

What do the seminarians want to learn, so that when they are already in the parishes, they would know it? Like for example, we suggested how to design a *kumbento* [convent], things like that. How to do a *mini-coop* [cooperative], how to file records, how to archive . . . so be very, very specific, but very, very helpful when someone gets assigned in a parish. Actual concerns with actual training.

Fr. Joseph, however, explained that this course alone was not enough to prepare young educational leaders. He saw that one of the limitations of the course was that it was specifically designed, back then, for soon-to-be pastors in parishes, not priests who would be running

schools. He wished that there was something similar for those Jesuit formands who were personally interested or might have been identified by their superiors to serve in schools in the future.

***Intentional scaffolds.*** Some participants felt that during their formation years, the structure to intentionally reflect on their leadership roles, much less purposefully connect their theoretical learning to their future assignments conspicuously lacked in the seminary program.

An example of this pertained to the formative value of integrating the notion of faith that does justice in their apostolic ministries. Fr. Robert admitted with hesitation:

Yes, we've heard of that [dimension]. But honestly, it's difficult to have a grasp as to how it was manifested. Yes, we do all the interaction with the poor, but personally, I could not figure that out: In terms of "I'm doing this because this is faith that does justice." So, it was not a conscious thing . . . but it just surprises me. Now that I am doing this now, that I'm dealing with students who cannot pay for their tuition . . . that, in fact, it's actually very real. I don't know if it's just me that's oblivious of the "faith that does justice" battle cry that we have. But what I'm sure of is that it has grown in me now. But I cannot figure out when in the formation was that [made] very clear to me personally.

Fr. Paul posited that this situation was reflective of the formation culture that Jesuits might have in the Philippines. He observed that the formands were generally left on their own, "without the scaffolds of a programmatic learning." He expressed regret on how some formators and superiors "felt that things would be [automatically] learned vicariously and through experience; and that everything will [just] be led by the Spirit." He claimed that when he was in theological formation, the priest-formator assigned to supervise and direct them in their weekend apostolates "was of little help" to them. Furthermore, he pointed to the example of the training that they received in spiritual direction as novices. After those initial sessions on how to give directed retreats in the novitiate, the formands, according to Fr. Paul, "were expected to learn and do things on [their] own." With a bit of criticism in his tone, he decried this practice as some

kind of institutional hubris, “*Mejo mayabang ito* in a way. ‘Since *magaling naman ang mga Heswita, kaya nila kung ano man ang ibigay sa kanila.*’” (“This is being a bit too proud. It’s like saying: ‘Since Jesuits are known to be bright and talented, they can just handle anything thrown at them, and figure things out on their own.’”)

**Individualized apostolic guidance.** From Fr. Paul’s reflection, it was evident that formands who were still inexperienced in the apostolate need to be inducted into their leadership roles gradually during their formation years and even into their first years of ministry.

**Mentorship during formation.** Fr. Joseph recalled that there was a program that was started during their years in the seminary that allowed for the formands to identify which apostolates they found great interest in and thus, prompted them to seek local mentors who could guide them in their apostolic development. Fr. Isaac even remembered as a seminarian, submitting to their formators a “wish list” of three possible ministries that he could focus on as an ordained Jesuit. He was even ready to suggest possible Jesuit advisers or “Jesuit expert-practitioners” who could be helpful in discerning possible works that formands like him could engage on a more permanent basis after ordination.

Fr. Joseph brought to mind how he was already interested in the education apostolate even as a scholastic and so had approached one of the Jesuit school presidents at that time to be his “mentor.” Fr. Joseph’s informal mentor was instrumental in getting him involved for a while with activities organized by the Jesuit Basic Education Commission (JBEC). However, opportunities and enthusiasm seemed to have waned because “things” (i.e., agreements, funding, assessment structures) were not formalized in the formation program. He assessed the short-lived mentoring series as being more like an informal set-up that stayed on a “nice to have” level



rather than being fully integrated into the seminary formation program. Fr. Joseph hoped that there was “some sort of . . . specific training for a Jesuit in terms of what he was [interested in and] capable of, [so that] he would have gone to [the] mission better prepared.” He also justified that these specific training modules, in tandem with the more general approach of Jesuit formation, were valuable “investments” on the formand.

Fr. Joseph felt that nothing is lost even if the Jesuit formand was eventually assigned in a different ministry other than what was projected in his formation (e.g., not in a mission school) because no matter what assignment, he would still be able to take with him the core leadership skills that he had learned. Fr. Robert resonated with this sentiment, recalling the training that he received when he had gone on a summer immersion program at another Jesuit social apostolate under the mentorship of a senior Jesuit: “[T]he skills that I learned there, I carry with me until now. So, nothing is wasted, actually.”

***Mentorship during the first mission.*** Fr. Paul shared another insight as he ruminated on the possibility that the solution to the leadership formation gap should not only be addressed during the Jesuit’s formation years in the seminary but also during his first pastorate.

Maybe the solution was not so much preparing ahead of time. Because I mean, even as I have pastoral methods courses [in theology], I hardly remember them. But then, the idea of having somebody to mentor you, as you [actually] do it, learning along the job, right? Like having somebody to run to, to guide you, might be a better set up.

Fr. Paul added that the mentor does not necessarily have to be a Jesuit, but any individual or team who is knowledgeable and competent on the matter of school leadership in the context of the Jesuit vocation. He intimated that the Dean of the College of Education in a Jesuit university in Northern Mindanao had, in fact, already manifested her interest to assist the Jesuit leaders in the mission schools if she would be asked to do so in the coming months.

**Monitoring for leadership growth and succession planning.** A couple of participants also suggested a formation tool that is very much related to mentoring: systematic monitoring of formands for leadership development.

***Leadership succession plan.*** According to Fr. Aloysius, this might have meant, first of all, the need to set clear term limits for existing school directors so that a succession of leadership can be planned ahead of time. Fr. Aloysius also mentioned that formators and superiors must be willing as early as possible to identify Jesuit scholastics in the formation pipeline as future replacements for outgoing school directors. Fr. Aloysius further explained that if the formands are made aware earlier on of the likelihood that they will be assigned in the mission schools, then they can avoid that initial anxiety of reaching their assignments “not knowing what to do.” Indeed, Fr. John said that had he known ahead of the likelihood of being assigned in a mission high school, he would have already sought training and mentors for himself even before stepping foot in St. Rita’s High School.

***Relevant and timely feedback.*** In relation to this, some participants also stated that it would have been beneficial for them to have received pertinent and sensible feedback during the course of their formation leading to their assignment after their ordination. Fr. Joseph and Fr. John pointed out that even though there were some non-academic feedback systems put in place in the formation program, these were hardly given much weight. They also observed that the leadership knowledge and skills of formands were not assessed appropriately and did not necessarily come out in the conversations with the provincial superior (e.g., annual manifestation of conscience). Fr. Joseph clarified that this was probably expected because leadership aptitudes, much less school administration skills were not part of the key objectives of the seminary

formation. It was also not assessable because scholastics even in their regency assignments, do not usually occupy leadership posts.

This [lack of formal assessment] is understandable because the formation goals may not focus on this aspect. It may come up as part of one's interest in the ministries of the Society. I don't think also that there is enough data for assessment since we have not exercised formal leadership roles, such as being an assistant principal or principal.

Fr. Joseph also quipped that a Jesuit leader would more likely hear feedback on his leadership through community rumors than through any formal mechanism.

Indeed, when I reviewed the feedback forms for Jesuit formands (see Appendix H for sample evaluation form for Jesuit scholastics in regency formation and Appendix I for formation objectives evaluation form) that I collected for this study, there were barely enough rubrics to measure one's leadership growth in the seminary. Much emphasis was given on the interiority, academic progress, and communal living of the formands. Leadership development goals were only subsumed under the formands' observable attendance and involvement in the short-term seminary apostolates in which they participated.

### **Further Thoughts on Formation Curriculum, Pedagogy, and Evaluation Processes**

The participants went on expressing their thoughts as well on what could be improved in their formation on matters of content, pedagogy, and assessment.

**Content: specialized curriculum.** Fr. Thomas and Fr. Paul went back to their experiences in the OMIOD workshops and felt that it would have been better if they had more topics on the basics of school financial management and networking.

Fr. Aloysius and Fr. Thomas highlighted the usefulness of taking education courses (i.e., principles and fundamentals of education and classroom management and assessment) in the university before the formand's regency assignment. Fr. Aloysius suggested how this should be

part of the core formation subjects and not merely electives during the formand's first round of academic formation. Fr. Robert, agreed to this suggestion because as he had observed, most of the formands end up with a teaching regency assignment anyway. Moreover, Fr. Aloysius thought that "[I]t might help to include in pastoral training [during theological formation] short courses on school management, financial management, human resource management, and leadership." Finally, Fr. Paul suggested that sometime before a Jesuit is actually assigned as a school leader in a mission school, where he would most probably be left to fend for his own, he should become familiar with some "knowledge on curriculum planning, faculty supervision, school policies, government policies, Catholic education standards, human resource management, applying for funding, [and] managing financial resources."

**Delivery: adult-learning methodology.** Generally speaking, the participants expressed that some elements of their seminary formation were helpful, though how they were prepared as adult-learners for leadership roles could still be improved. Three of the participants reiterated the value of exposures or contextualized experiential learning. Fr. Isaac even recommended that the formation should include more adult-learner-appropriate pedagogy such as deliberate immersion program to the mission schools that engage in real-life situations and problem-solving:

Summer immersions in a mission school could be an ideal way of preparing scholastics for a future ministry in the same setting. By being involved in the actual running of a school they would see what kind of training they would need, and this would have to be communicated to the apostolate directors early on. A tailored [needs-based] assessment of the problem in an actual workplace can really help a future school director a lot.

**Assessment: holistic evaluation.** The participants wished there was a better way that scholastics were assessed of their readiness for leadership roles, but they had no concrete suggestions in improving the way they ought to be evaluated before being sent to the mission

schools as directors. Fr. Robert, for his part, felt that the tools of assessing him before he was ordained and sent on his first pastorate was generally adequate, given the trust he had placed on the Jesuit superiors. He pointed out, however, that the more intangible aspects of the formand's character and personality, such as his zeal, creativity, and resilience, could be crucial gauges for the Jesuit's suitability in the missions and possible success in his leadership role. "It's more of the formand's disposition and receptivity towards what we already have that ultimately makes the difference," Fr. Robert stated.

Nonetheless, Fr. Paul, indicated that holistic and suitable feedback from formators are still valuable and necessary for one's growth as a Jesuit leader. He regretted how his class only received little feedback, supervision, and mentoring, when as seminarians, they were already tasked to "be [university students'] organization moderators, pastoral leaders in [their] various apostolates." For him these were occasions in his formation when he felt they were "left on their own" when instead they could have been methodically guided by their formators to develop specific leadership skills.

### **The Magis: Going Beyond What Is Expected in Regular Seminary Formation**

Although the participants generally agreed on the usefulness of some of the elements of the seminary formation that they had received, there was a subtle longing in the responses of the participants for Jesuit leadership to specifically improve the preparation program of future school leaders for the sake of the communities they served.

**Forming servant leaders for and with others.** Fr. Aloysius explained that Jesuit formation is "good" even "beautiful." By this, he meant that the program of formation he received was generally adequate and enriching for him. He also appreciated how it was very

flexible. He, however, believed that it could still be improved not just so that formands can be “ready for work,” but to be of better “service to others.”

Fr. Robert recognized, however, that a misplaced notion of service can lead to the “apostolic burn-out” of a fledgling young priest toiling to manage a struggling mission high school. He said that it is vital that a Jesuit leader learns to “take care of [himself] spiritually, physically, emotionally, so that [he] can serve better [and] have better relationships,” in the community.

Fr. Aloysius qualified, too, that serving better does not mean entering the school community as the sole person responsible for its growth and progress. Indeed, he urged that as much as the Jesuits can, scholastics must learn and be guided early on to become leaders capable of serving generously and selflessly but not from a privileged, almost messianic perspective, but as “co-leaders” ministering for and with others in the margins. He believed that Jesuits could learn to be more collaborative in their style of leadership.

Fr. Paul also warned of the consequence of an imprudent formation that does not account for who the Jesuit becomes as he enters the world of those in the peripheries. Fr. Paul pensively shared:

It is a great mission to be a part of, such a privilege in a way. I just felt that maybe we could have done it a little better [in preparing ourselves for this mission]. One of the things that I struggled with is that, I’ve realized that I was, or I may have been already, abusing my power in a very subtle way. A [scholastic] asked me once, “What’s the difference between a scholastic and now that you’re ordained—because scholastics are also involved in apostolates too, except for saying Mass and Sacraments?” So, I told him, “It’s power!” Especially in the mission area, you don’t know that [until] it just creeps in. And then suddenly, we can experience a little bit of entitlement, clericalism. It’s [in] the way you exert your authority—the way [you] demand. The way you expect things to happen in the way you want. *Basta* [Simply put], it creeps up slowly. It’s very scary.

Fr. Paul, was thus, expressing a need to be more attentive to the socio-cultural power dynamics that exist between them as the clergy, taking on top school leadership positions, and their lay colleagues and subordinates in less influential appointments. Clericalism, as he had hinted in his reflection, can manifest itself in the leadership of priests who may be unaware of the power they wield and the effects of their decisions on the school community, even after they finish their terms.

**Paradigm shift away from clericalism.** Thus, Fr. Paul's radical suggestion in terms of the educational leadership preparation of young Jesuits for the missions extends beyond the scope of improving certain formation aspects or the use of specific formation tools. He proposed a shift in the Philippine Jesuit province's perspective on what mission schools are. He emphatically pointed out how the mission areas and schools in SPMD "always end up in the tarpaulins and the magazines," because these images of the Jesuit missions seem to serve as good promotional materials for recruitment and fund-raising. Fr. Paul lamented, however, that if a Jesuit with a doctorate in education ends up in the mission areas, Jesuits and lay collaborators would immediately say, "What a waste . . . he should have ended up in Ateneo."

Fr. Paul ruminated and put forward a challenge to Jesuit leaderships in the Philippines: "And if we're serious about schools in the mission area as we are serious about schools in the city, then we should be putting the good (competent) people [here] also." Fr. Paul concluded by stressing that mission schools should no longer be "treated as laboratory for young priests." This mindset, according to Fr. Paul, "shortchanges" the communities who simply "put-up" with the Jesuits because they do not have much choice. He believes that the students in the mission

schools deserve competent and committed Jesuit leaders too, in the same way that the students of more-established and well-funded urban Jesuit schools do.

### **Summary and Synthesis of the Data**

In response to the two research questions, the data that I gathered through multiple qualitative means and “explicitated” through a phenomenological perspective yielded the following insights:

#### **On the Leadership Experiences of the Participants**

Although there was a general sense of anxiety in receiving the unexpected assignment of leading a mission high school in the peripheries of the Southern Philippines, the participants took it as an integral part of their Jesuit mission and identity. There were several specific areas where the first-time school directors struggled. They found it particularly challenging to wear multiple hats and juggle varied tasks even as they were just getting acquainted with the apostolic terrain of the mission.

Their general response to the daunting problems that confronted them, however, was to learn quickly on the job. Their learnings started with a better appreciation of themselves in the context of their respective mission schools. This disposition gradually allowed them to have a more nuanced understanding of what roles they have in the schools and what the schools meant to the communities they served. The participants recognized that despite the difficulties of coming in with very little preparation, there were occasions when they succeeded and overcame demanding challenges. Particularly noteworthy were some of the participants’ attempts in upholding and sustaining the indigenous cultures and heritages in their communities and in providing ways of supporting the education of their most vulnerable students.



## **On the Participants' Perception about Their Seminary Formation**

Generally speaking, the participants saw the value of their seminary formation but also desired some improvements in it to prepare future leaders for their work in the mission schools. They found their formation effective in imparting the suitable dispositions of openness and flexibility that were needed in a mission where most of the knowledge and skills in supervising the schools were learned “on the fly.” The participants found the formation stages of regency and theology as helpful. The participants were unanimous in specifying how structured programs that imparted practical managerial skills or educational tools were beneficial to them. It was notable, however, that according to some of the participants, it was their training and employment experiences before becoming Jesuits that were most practical in preparing them to lead schools in the margins.

The participants also shared what they perceived to be areas for improvement in the Jesuit leadership formation in the Philippines. They felt that experiential and intentional leadership programs that would have exposed them to the administrative dimension of the more established Jesuit schools or immersed them beforehand in the context of mission schools should have been made available to them. A number of the participants also called out the lack of mentoring or guidance of young Jesuits who showed interest in the educational ministry early on during their formation years. Mentorship should have also been provided to them as they began their assignment in the mission schools after ordination.

Some of the participants also pointed out that the formation could have been more deliberate had the superiors and formators identified early on who among the formands could replace outgoing mission school directors. By doing so, the formators could have provided for

additional training that would be appropriate and valuable in the scholastics' future ministries. Further still, timely feedback and applicable evaluation of leadership skills could have also been given to the formands as they progressed towards ordination and their first assignments.

A few participants also cautioned about the “creeping” sense of clericalism and the danger of apostolic fatigue and how they could distort the notion of service among first-time school directors. Finally, a participant proposed that a shift in the mindset of how mission schools are seen in the Jesuit Philippine province could have a positive effect on how Jesuits are prepared and missioned for leadership roles in schools at the peripheries.

## **CHAPTER 5**

### **DISCUSSIONS, RECOMMENDATIONS, AND SUGGESTIONS**

#### **Introduction**

Today's school leaders face the reality of a complicated educational landscape that places on them expectations to make a positive difference in their institutions and the lives of their school community members (Kemp-Graham, 2015; Leithwood & Riehl, 2003). In the Southern Philippine Mission District (SPMD), Jesuits who have been assigned as first-time school directors, readily took on administrative roles in mission high schools as part of their vocation. They confronted various concerns to provide quality Catholic education to underserved students in a setting that was different from the general environment of their seminary formation. Their professional responsibilities have become more complex over the years. The seminary curriculum and programs, however, continue to form seminarians mostly for the usual pastoral functions only (Boyle & Dosen, 2017). The status quo has inadvertently created a gap in the preparation programs in seminaries. The current formation setup does not adequately train educational leaders among the clergymen (Boyle & Dosen, 2017) to be proficient in transforming their schools to be inclusive and responsive to the multifaceted needs of all their students (Jean-Marie et al., 2009; Kemp-Graham, 2015; Preston et al., 2013).

In this final chapter, I will discuss and integrate the findings, noting their relationships to previous research and alignment with this study's conceptual framework, to begin bridging the leadership formation gap in seminaries. In line with this, I will recommend an educational leadership preparation initiative for a specific group of Jesuits before their assignment as school

directors in mission high schools. Finally, I will end this chapter with suggestions for future studies and a few concluding comments.

### **A Reiteration of the Research Purpose and Questions**

This qualitative phenomenological research accomplished two interconnected goals: (a) explored the educational leadership experiences of newly ordained and first-time school directors of mission high schools in the Southern Philippines and (b) appreciated the perceptions of how they were prepared for this role through their seminary formation.

In order to attain these objectives, I responded to the following research questions:

- What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?
- What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders?

### **Significance of the Findings**

This study is significant to the Philippine Jesuits, to other missionary orders with educational ministries, and broadly to scholars in the field of educational leadership. In terms of focus and scope, this study is the first of its kind in the Philippines. No one else has done any specific study on the leadership experiences of Filipino clergymen assigned to lead schools in the country's peripheries. Moreover, the connection between their experiences and how they received leadership formation in a Catholic seminary is also an unexplored phenomenon. That is why this current study, that sought a better understanding of the leadership experiences of priest-

educational leaders in the field, is not only relevant but urgently needed in the development of purposeful leadership preparation structures in seminaries. As professor of pastoral leadership

Mark Fischer (2010) openly acknowledged:

Leadership development has become more important in recent years as the number of priests has declined and as the time between ordination and the first pastorate grows shorter. By exploring the potential for leadership development within the existing seminary curriculum, professors and formators can promote this aspect of formation. It is not treated in great detail in the Church's official documents, but it will loom ever more important. (p. 16)

This study amplified the voices of the leaders from the margins. It highlighted their success and challenges in school leadership and their hopes for a more thorough and applicable educational leadership preparation for their future replacements.

With the recommendations that I will present in this chapter, Jesuit superiors and formators in the Philippines will have enough data to inform their decisions regarding their choice of successors for the current school directors in the mission schools. They can also use these recommendations to modify the current seminary formation and strategically include the leadership training that will be applicable and most helpful to young priests missioned to be first-time school leaders.

Furthermore, other missionary orders may also profit from this comprehensive study by conducting similar research and developing their contextualized program of educational leadership preparation for their specific formation houses or seminaries. Finally, this study partially addressed the dearth of academic literature on the subject of educational leadership preparation of the Catholic clergy, particularly in some developing countries, where the Catholic Church still plays a pivotal role in the education of underserved youth.

## **Discussion and Implications of the Findings**

School leadership is a complex demanding responsibility. The participants made this sentiment clear in our interviews and discussions. Their initial anxiety of receiving a new mission for which they felt unprepared was very much similar to the experiences of other leaders from small Catholic schools (Belmonte & Cranston, 2007; Grace & O’Keefe, 2008; Okochi, 2009) or novice school administrators in challenging rural and high-needs environments (Preston et al., 2013; Starr & White, 2008). Nonetheless, as other researchers have shown (Frattura & Capper, 2007; Theoharis, 2009, 2010), the participants in this study manifested a general capacity to overcome limitations in their difficult leadership contexts as they attempted to provide some improvements, albeit limited, in the care for and learning of their students and the rest of their school community.

### **The Leadership Experience in the Margins: Apprehensions and Possibilities**

As first-time school directors, most of the participants initially felt surprised by their assignment and overwhelmed by the immensity of their tasks. Some thought that they were in a constant “survival mode” during their first years of leadership. Thus, their immediate attention was focused squarely on ascertaining that their schools had enough human and material resources to subsist.

**Struggling with context-specific personnel needs.** Much of the participants’ initial apprehensions pertained to concerns related to personnel. The first among these, concerned themselves. They needed to define their particular roles as school directors. Although the SPMD mission high schools have already been operating for several decades, the novice school directors still struggled in clarifying their functions at the start of their terms. It did not help that

they had very little time for a proper turn-over of responsibilities from their predecessors. Most of the participants went straight to their new assignments immediately after their ordination or their first pastorate. Moreover, the rural and isolated environment and almost laidback context of the mission high schools were far different from what they had gotten accustomed in the more traditional and established urban Jesuit schools during their regency years.

The participants struggled as well in shuffling multiple roles and responsibilities in and outside their schools. They were all school directors, but some were also pastors, retreat givers, and community leaders. Even though the participants had the desire to delegate responsibilities to other administrators and faculty, they simply found it difficult in their local circumstances to find the qualified persons for critical positions to assist them in managing the schools.

Hiring and keeping competent and experienced teachers were also common human resource issues for the participants. Their schools' meager resources made it particularly difficult for them to match, much less compete, with what the public school system can offer as compensation to credentialed teachers and administrators. They were aware of how the yearly shift in their personnel were not ideal. Indeed, schools for the underserved have been particularly vulnerable to the harmful effects of high teacher turnover on their pupils' learning (Ronfeldt, Loeb, & Wyckoff, 2013). Moreover, professional development for the faculty and staff were usually kept only to a bare minimum and were not prioritized at the start of the school directors' first term of office.

Quite a number of the school directors' personnel issues were also observed in previous studies such as those identified by Preston et al. (2013). What past research has not highlighted sufficiently, however, is how, in the particular contexts of rural mission schools, the over-

extending of leaders and the lack of qualified personnel to support the educational ministry have a far graver and more immediate consequence on the sustainability and quality of the institutions as compared to more established urban Catholic schools. The latter, generally, have greater human and material resources, and thus, more viable options to address their operational needs. Further still, in more prominent and well-funded Jesuit schools, the Jesuit leaders have a greater leeway in forming and improving their academic and administrative leadership teams who will work with them in reaching their schools' vision and mission. In marginalized mission high schools, however, the school directors, often being the sole Jesuits in their institutions, do not have this direct support, and often get bogged down by even simple personnel needs.

This stark reality was what Fr. Aloysius indicated in his stories about the seeming deficient sense of professionalism among some faculty members due partly to the school ethos but mainly because of deficient recruitment and the lack of proper and updated professional development. This situation eventually resulted in a culture of “laxity” or lack of academic discipline among their students as well. He also referred to this personnel issue when he spoke about how, in the absence of qualified school finance staffs and rigorous systems, their institution had been exposed to a costly financial controversy in the past. Similarly, Fr. John of St. Rita's found it incredibly challenging to begin his term in the middle of the school year with a school treasurer who was equally inexperienced and uninformed about the school system as he was.

**Struggling with the pastor-manager role balance.** The participants also expressed frustration in initiating reforms mainly because of their other significant societal role of being pastors or priests in the community. Although not explicitly referring to clergymen as school



leaders, Preston et al. (2013) posited that a peculiar difficulty for rural school leaders emanated from taking on seemingly disparate roles in the school environment, in the case of this study, as pastors and administrators. Such contrasting roles in the eyes of some of their lay colleagues and parishioners “cannot be detached from the historical and social practices of the immediate community” and therefore, required of the school directors to “nimblely mediate relations within the local community and the larger school system” (Preston et al., 2013, p. 7).

In the case of the mission high schools, the traditional and conservative Catholic environment in the participants’ rural setting often stereotyped the Jesuits as pastoral, gentle, and patient priests who should be more like generous and amicable patrons rather than efficient and thorough managers to their faculty and the rest of the school community. For a number of the participants, because of this social expectation, they found it extremely challenging to balance their pastoral and administrative roles without sacrificing one over the other, most especially when they make difficult human resource and student disciplinary decisions. On the other hand, some participants had observed that, precisely because of their dual influential roles, they were more prone to exploit their position and revert to a kind of clericalism in their manner of leadership.

**Struggling with operational and institutional viability.** Worrying about the operational viability of the school was also at the forefront of the minds of the participants. This matter corresponded with one of the conclusions that Okochi (2009) made in his research on the educational leadership experiences of clergymen in the Diocese of Awka in Nigeria. Although the context of Nigeria is different from that of the Philippines’ Okochi’s (2009) reference to

fundraising as a significant challenge that confronted priests as novice school leaders resonated well with the participants of this study.

Like the participants in Okochi's (2009) study, the Jesuits assigned to lead mission schools felt an intense pressure to seek a constant flow of funds for infrastructure maintenance and improvements, scholarship grants and learning facilities for students, and at times, even salaries for lay teachers and administrators. What has gone unmentioned in previous studies, however, is the role of social capital in their leadership efforts. As seen in this study, it was through the Jesuit network of benefactors and more-established Jesuit schools and universities that the participants were able to solicit both personnel and financial assistance for their institutions and students. Because the Jesuits in this study belonged to a relatively vast network of other related institutions, they brought with them a respectable amount of social capital in their leadership roles. Admittedly, however, it took a while for some of them to consolidate their efforts and maximize this social asset for their institutional advantage.

**Learning to be mission-oriented and mission-driven school leaders.** The participants realized soon enough that effective educational leadership was necessary to keep their education mission relevant and sustainable. They had to adjust quickly to the conditions of the mission schools at the margins. Moreover, they needed to learn as much as they could as they progressed in their ministry, particularly in the manner that they related with their lay colleagues, sought support from external benefactors, coordinated with public agencies, and advocated for improved education for all their students. As the participants tapped into their missionary values and convictions, they became focused on making a difference in their institutions. Indeed, as Bogotch

(2000) similarly observed, educators who act on their passionate beliefs make a profound difference in their leadership.

*Re-imagining Filipino school leadership for Jesuits.* The traditional notion of Filipino school leadership would place much emphasis on symbolic kinship or the value of relationships that often rely on the patron-client dynamics (Sutherland & Brooks, 2013). Although the participants recognized that because of their socio-cultural status in a highly religious context, they were almost automatically elevated unto a position of power, their notion of sincere service through their ministry would eventually take precedence.

Indeed, one can note that in terms of their leadership stance, the participants' Jesuit identity was more pronounced than a noticeably Filipino conception of educational leadership. To be sure, they were aware of their distinct Filipino identity and how it affected the way they led, but this notion did not supplant their Jesuit vocation. The participants, albeit struggling to gain a foothold in their initial term as first-time school directors, were keen on using their administrative posts as a platform for reform and social change. Their disposition akin to servant-leadership was reflective of what Jesuit educator Fr. Karel San Juan (2007) had noted to be a profound application of the Jesuit leaders' Ignatian spirituality in their professional responsibilities.

*Leading for and with the marginalized.* Propelled with an earnest missionary disposition to lead from the margins, the participants tried to equip themselves with enough educational leadership knowledge and administrative skills to gradually move towards becoming better apostolic leaders and effective managers for and with the vulnerable.

There were several school concerns that required of them specific skills related to capital and human resource management and development, financial accountability, organizational sustainability, and safeguarding the rights and welfare of their students. They became acutely aware that these issues confronting them at the onset of their leadership term ultimately had a profound impact on their students' holistic growth and learning. Accordingly, they felt compelled to act against the inequities that they witnessed in their schools in order to serve those who were in most need at the peripheries. Similar to how critical scholars have described transformative school leadership (Bogotch, 2000; DeMatthews, 2015; Oplatka & Arar, 2016), the gallant effort of the mission high school directors, despite their acknowledged shortcomings, speaks of their attempt to live out their notion of a Jesuit servant leadership.

***Shifting from managerialism to transformative leadership.*** The impetus to take on the leadership responsibility as integral to their Jesuit vocation of serving those entrusted to them in the margins spoke about what scholars referred to as a shift in the emphasis in the notion of school administration: from a simple view of managerialism to transformative leadership (Oplatka & Arar, 2016; Rivera-McCutchen, 2014). As noted by Frattura and Capper (2007), an awareness of the growing population of underserved students and their deteriorating socio-cultural conditions could prompt this paradigmatic shift. The urgent social and economic needs of impoverished communities, which the participants recognized to be true in a general sense during their seminary formation years, they now have experienced and understood in a nuanced manner in their own mission schools.

***Building the right leadership character.*** Through my interviews, discussions, and observations, I recognized how the school directors manifested in various degrees some

indispensable qualities that have also been identified by Furman (2012) and other researchers (Bogotch, 2000; Jean-Marie et al., 2009; McKenzie et al., 2008) as characteristic of educational leaders for social justice. They were (a) transformative and action-oriented, (b) relational and caring, and (c) reflective.

*Transformative and action oriented.* Fr. Thomas, Fr. Paul, Fr. Aloysius, and Fr. John exemplified these qualities as they instituted several programs that supported the contextual learning needs of their IP students and improve all their students' learning through better-quality teaching methodologies and more inclusive or safer school environments for them. They showed what several educational leadership scholars emphasized as an essential leadership trait of possessing an astute critical awareness of the oppression and exclusion that happen within their schools (Brooks & Miles, 2006; Furman, 2012; Jean-Marie et al., 2009; Shields, 2010). Because of their consciousness of the disadvantaging of some of their students, they were able to raise funds to build IP student residences, engage the community to support cultural diversity, as well as advocate and inspire the IP students to stand up for their rights. These examples showed what previous studies had identified as the school leaders' thorough appreciation of the connection between social justice and student success (Bustamante et al., 2009; Flanagan et al., 2007; Young et al., 2017).

*Relational and caring.* Fr. Robert and Fr. Joseph led a mission high school that was not within their area of residence (unlike the other school directors whose schools were within proximity to their residence and parish). Nonetheless, they made sure that they frequently visited their schools and spent enough time with their faculty and administrators who had direct contact with their students. Their regular conversations with their faculty allowed them to get in touch

with the “sentiments on the ground.” As I had observed on-site and recorded in the school directors’ various conversations, the participants manifested sincerity and thoughtfulness in their professional dealings with their colleagues. This was exemplified by Fr. Robert and Fr. Joseph in the staff meetings that they had with their teachers and fellow administrators. They were accessible yet never patronizing and paternalistic. Such professional but friendly relationships could have only been nourished through time by mutual respect and open communication (Furman, 2012). Theoharis (2007) had also observed that school leaders who were effective in addressing issues of inequities in schools had done so by supporting all members of the school community in a manner that upholds their dignity.

*Reflective.* Previous studies illustrated that school leaders who lead from a social justice perspective are critically self-reflexive and thus understand well their possible influence in situations that cause inequities. As such, they can think analytically in order to address injustices (Argyris, 1982; Fischer-Lescano, 2012; Theoharis, 2009), even those that may have been caused by past structures and biases.

Fr. Isaac spoke about this when he recognized the school’s difficulty in sustaining the attendance of students who had to work as farm laborers. Instead of penalizing them for their unexcused absences, as one’s administrative instincts might have prescribed, he collaborated with his colleagues and the students’ parents to reflect and find creative solutions to improve their class attendance. Restorative discipline standards, as a way of guiding and reforming misbehaving students, have also started to take root in the leadership purviews of some the school directors. Fr. Paul briefly mentioned this in his attempt to resolve and curb bullying cases in his school.

Fr. Paul further showed deep reflexivity when he acknowledged that an important step in addressing the seminary leadership formation gap is to look at the mission schools from a different perspective and avoid the temptation of subtle clericalism. He acknowledged that, through humble introspection, it might be possible to veer away from viewing the whole educational enterprise in the Southern Philippine Mission District (SPMD) as merely a case of dole-out charity that does not even include other school community members (i.e., faculty, administrators, students, and parents) in the process of improving the quality of education in the margins.

### **The Jesuit Leadership Formation: Hits and Misses**

The retelling of the participants' experiences was a fertile seedbed for thoughtful recollections of their own leadership formation in the seminary and its relevance and contribution, if any, to their initial term as mission school administrators. The participants' emphasized that the current seminary structures, though generally effective in preparing them for pastoral ministries, should still engender improvements not just in content (i.e., curriculum) and delivery (i.e., pedagogy) but in the manner of assessing their preparedness for specific leadership functions (i.e., school director) in ministries that have real-life impact in the communities that they will accompany and serve.

**School of theology and pastoral ministries.** The Jesuit scholasticate in the Philippines is the primary formation structure that prepares future Jesuit priests for their apostolic engagements. The Loyola School of Theology (LST), where the Jesuit scholastics spend the final four to five years of their basic formation, is at the center of this seminary training. The participants accomplished their formal studies and instruction in theology and pastoral ministries

at LST. This ecclesiastical and academic institution gave them the competence to be ordained ministers. As observed in past studies on seminary curriculum and leadership formation (Boyle & Dosen, 2017; Fischer, 2010), however, the participants pointed out that their seminary training, though generally helpful in certain aspects in human and spiritual formation, needed improvement in training for practical ministries in the margins.

**Human formation.** The participants are grateful for their exposure to the realities of the underserved through socio-spiritual experiments in the novitiate and their engagements in short-term apostolates or theological reflections in their courses on Catholic social teachings and pastoral methods. These helped them on the aspect of conscience formation. These classes during theology and other similar structures such as the Sunday pastoral apostolates throughout their extensive formation, shaped their Christian values and social justice perspective. Indeed, their pastoral motivations and critical awareness became evident in the interviews, discussions, and observations that I had with the participants.

This observation should not come as a surprise to anyone because human formation, as emphasized in *Pastores Dabo Vobis* of St. John Paul II (1992), has truly become one of the main strengths of most modern-day seminaries (Fischer, 2010; Oakley, 2017). As Oakley (2017) indicated, human formation has become the foundational aspect of seminary formation. So much so, that in tandem with spiritual formation, it has attempted to guide seminarians to an enduring commitment to personal growth and affective maturity necessary to live their lives as future clergymen and effectual pastoral ministers in the service of the Church (Oakley, 2017).

Despite this noteworthy focus on human formation, there may still be a need to understand more methodically the imbalance in the socio-cultural power dynamics that result in



possible clericalism among first-time school directors leading in the particular context of the SPMD. As some of the participants articulated, this false sense of self-import, whether manifested in individuals or as a religious order (i.e., Society of Jesus) can creep into the mentality of young priests and undermine the progress in upholding the mission schools as catalysts for social change.

**Effective apostolic leadership skills.** Though cognizant of the fundamental value of their spirituality and missionary disposition in exercising their leadership functions, the participants were very much aware that specific leadership knowledge and skills would have aided them to address the complexities of their school responsibilities from the very start of their assignment.

Some of the leadership knowledge and skills that the participants wished to have acquired for themselves during their seminary formation were directly related to the school concerns that the novice school directors had to tackle head-on early in their terms. Some of these that they mentioned are related to (a) human resource management and development, (b) asset generation and distribution, (c) organizational management, and strategic planning and implementation, and (d) instituting safeguards for the inclusive learning and protection of all their students. For most of them, they had to learn these competencies on-the-job through trial and error.

**Support structures for leadership growth.** Participants like Fr. Paul, Fr. Isaac, and Fr. Aloysius voiced their concern over what they felt was a kind of laissez-faire attitude and methodology towards leadership training in the seminary. They had a sense that there were many occasions when they were left to fend for themselves in learning specific knowledge and skills that would have been practical for their future ministries. Hence, they spoke about the need for a

more intentional and programmatic educational leadership preparation that could be an integral component of their seminary training, so that formators and superiors could guide and evaluate them on this aspect during formation and even in the early years of their priesthood.

The participants emphasized, for instance, the value of experiential learning and mentorship, as well as the possibility of internship and induction programs for future school leaders as facilitated by past school directors who are familiar with the terrain of and needs in mission high schools.

**Reliable leadership evaluations.** Another crucial dimension of formation that the participants wanted to improve pertained to relevant feedback on and assessment of one's readiness for leadership roles. They acknowledged that feedback from and dialogues with the superiors and formators are not alien concepts in the Society of Jesus. In fact, all the participants met not just with their peers and local superior in community meetings but with the provincial superior as well through their annual manifestation of conscience. However, comments and recommendations on their leadership practices, from their years in formation up to their ministry in the schools, were rarely offered in a formal or structured setting. This was mainly because leadership, specifically school administration, was not an explicit formation objective in the seminary. Furthermore, superiors and formators did not have enough data about the leadership performances of their formands on which they can base their evaluation. This situation persisted, however, even after the formands' ordination and assignment to crucial leadership posts in mission schools. In this case, the problem is most likely due to the lack of prescribed evaluation tools with set leadership rubrics and a formal structure to receive and process, in a timely manner, such information to regularly evaluate a Jesuit school director's leadership capability.

## **Recommendations for Practice: Bridging the Leadership Formation Gap**

The aspiration for an improved leadership formation within the seminary was apparent in the candid and thoughtful recommendations of the participants in this study. For this to come to fruition, the Jesuit order's leadership and formators must bridge the leadership formation gap and develop an educational leadership formation plan for specific scholastics who will be assigned as future directors of mission high schools.

### **An Educational Leadership Formation Plan for Filipino Jesuits**

Having considered the reflections and suggestions of the participants, as well as the literature collated on school leadership preparation programs (cf. Chapter 2), I recommend that intentional and programmatic educational leadership modules be created and offered to the chosen Filipino Jesuits who will be assigned in the mission schools soon after their ordination.

The Jesuit formators, through the school of theology and pastoral ministries (Loyola School of Theology), can offer these leadership modules after the formands' theological coursework and comprehensive exams but before they leave for their mission school assignment. These modules are similar in form to the specialized training of the Ateneo de Manila's Office of Mission and Identity (OMIOD), which the participants of this study took part in during their early stage of seminary formation. The main differences are in the targeted content as well as in how the participants are supported and evaluated up to their initial years of school directorship.

### **Adopting the Conceptual Framework**

In Chapter 3, I presented a framework for an educational leadership preparation program that aims at developing school leaders for social justice within the seminary formation. It is a model based on the work of Capper et al. (2006). I modified it slightly to include the

fundamental educational outputs of the Ignatian Pedagogical Paradigm, as presented by Fr. Kolvenbach, S.J. (2005). As this framework has guided the explication of my qualitative data (c.f., Chapter 4), I also recommend its adoption to outline and support the educational leadership modules that will be made available to the Jesuit formands. Figure 10 is the representation of the nine domains of the conceptual framework. Within the dotted lines are the nine areas of the intersecting components of the framework to guide the development of the educational leadership preparation modules for Filipino Jesuit scholastics.

<b>EDUCATIONAL LEADERSHIP PREPARATION FOR FILIPINO JESUITS</b>	<b><u>Conscience</u></b> (dispositions and values that manifest critical consciousness alongside Jesuit missionary spirit)	<b><u>Competence</u></b> (conceptual educational leadership knowledge)	<b><u>Compassionate Commitment</u></b> (practical apostolic leadership and site-based management skills)
<b><u>Curriculum:</u></b> <i>Specialized Content</i>	Informed by Catholic Social Teachings, what socio-cultural-political awareness is needed by a Jesuit school leader in the Philippine margins?	What leadership and management concepts (i.e., interculturalism, financial accountability, human resource management and development, etc.) are needed in leading mission high schools?	What practical skills (i.e., site-based management) must be developed and practiced to lead mission high schools effectively?
<b><u>Andragogy:</u></b> <i>Content Delivery for Adult Learners</i>	How does a Jesuit educational leader develop critical consciousness in the light of Christian ethics?	How will conceptual knowledge be taught/learned by a Filipino Jesuit adult-learner through the leadership modules?	How are these practical skills developed and practiced through the leadership modules?
<b><u>Assessment:</u></b> <i>Holistic Evaluation of Learning and Application</i>	How deep has the Jesuit integrated critical consciousness into his leadership practices?	How comprehensive is the Jesuit's knowledge about educational issues in the mission high schools before he is assigned there?	How confident and thorough is a Jesuit in applying these skills before he is assigned to lead a mission school in the Southern Philippines?

Figure 10. The nine domains applied to the educational leadership formation of Filipino Jesuits. This figure shows the framework that has guided the development of an intentional educational leadership formation plan for future directors of Jesuit mission high schools in the Southern Philippines.

In summary, this framework, when applied to the proposed leadership formation modules, would intentionally develop a Filipino Jesuit's leadership conscience, competence, and

compassionate commitment through specialized and context-specific content, adult-learner-centered delivery of instruction, and holistic structured assessments of the formands.

### **The Three Main Objectives**

The objectives of the educational leadership modules are straightforward, according to the conceptual framework.

**Deepen critical consciousness.** First, they are meant to deepen the critical consciousness of Filipino Jesuits given the context of their future assignments in the Southern Philippines. Their awareness must go beyond a shallow comprehension of what their typical roles will be, both as pastors and school administrators. They are invited to critically acknowledge the complexity of their privileged positionality as prominent clergymen and strive for a greater personal and communal understanding of the intricacies and implications of oppressive power relations, and unjust social constrictions such as but not limited to racism, classism, and clericalism (Capper et al., 2006) in their future areas of influence in the margins.

The Jesuit missionary spirit, which the participants had presumably developed through the years of formation, is an aspect of the leadership training that must be highlighted but also refined through a more rigorous reflection on the socio-cultural and political dynamics in which they will lead. Thus, the attitude or human development element of the leadership preparation in the seminary must deepen further their critical consciousness so that they may acquire an acute perspective on social issues related to privileges, inequalities, and power structures (Allen et al., 2017; Berkovich, 2017; Brown, 2004a; Cambron-McCabe & McCarthy, 2005; Capper et al., 2006; Tillman et al., 2006). At the same time, the deepening of the young Filipino Jesuits' critical consciousness should always be informed by the Gospel values and supported by

Christian ethics so that their learning processes do not slip into unrestrained assimilation of secular ideologies that are contrary to their Jesuit identity and mission.

**Develop context-specific leadership knowledge.** Second, the modules should develop the capacity of future school directors to learn and articulate concepts related to evidence-based practices and data-informed policies that advocate for the success and care of all students and all those placed under their charge (Capper et al., 2006). In striving to meet this objective, the words of the former director of Catholic School Leadership Programs at Loyola Marymount University-School of Education (LMU-SOE), Anthony Sabatino (2016) can be a useful guide. He recommended integrating professional practice and Catholic faith through real-world “experiences that prepare students to grow as Catholic school leaders through project-based learning strategies. [So that] students learn that assessment, accountability, and transparency can serve well the mission, vision, and learning outcomes of every Catholic school” (p. 318).

**Apply socially just leadership principles.** Lastly, these modules should allow the Jesuit scholastics, though on a limited capacity through performative tasks and short induction periods, to apply their critical consciousness and knowledge in the actual context of the mission schools while under the direct supervision of their respective mentors. This objective should allow the Jesuit formands to transcend the banking concept (Freire, 2005) of seminary formation where they simply accumulate the lessons imparted to them by their formators and regurgitate them come examination time. Instead, the Jesuits-in-training are challenged to engage in a more experiential and problem-posing leadership development program that identifies real issues in their future school communities. Moreover, by directly working with their predecessors, mentors, and other mission school stakeholders, the Jesuits can discuss, plan, and seek mission-

driven solutions for these context-specific issues as they prepare for and transition to their particular mission school assignments.

### **Identifying the Leadership Cohort: Chosen for the Mission**

The assignment of the soon-to-be-ordained scholastics or young priests by the provincial superior, as it is currently practiced, is only announced towards the end of the academic year, when he has already met with most, if not all, members of the whole Philippine province and has assessed, with his consultants, the Society's various and total apostolic needs for the coming academic year. It is recommended that the provincial superior, upon dialogue with the Jesuit formands and consultation with their formators as well as outgoing mission school directors, should then identify at the earliest possible time who would take part in the special modular leadership classes.

Based on the most recent data (see Appendix J), for instance, there are only 10 Filipino Jesuit seminarians in theological studies (Jesuit Philippine Province, 2019). Those among them who are in their last year of theological studies will most likely be the possible candidates for the leadership modules. Other newly ordained priests finishing their first non-school administration pastorate could also join the cohort. Therefore, the sooner it is that these specific Jesuit scholastics and young priests are identified to participate, the better it is for them to prepare for their corresponding school leadership ministry in the missions.

Thus, this recommendation of an early identification of the participants for the training modules can alleviate the anxiety of not knowing one's assignment until a few weeks before beginning the actual ministry and the fear of coming unprepared for a new mission. A corollary

effect of this proposal would be the development of a clear succession plan by the Jesuit leadership for various apostolates, but more specifically, for the mission high schools.

### **Optimizing the Program Schedule**

Scheduling the modules for the chosen participants is almost as important as the content and delivery of the materials themselves. Here, two popular Jesuit adages might be helpful. The first is *non multa sed multum*. This means “not many but much,” and so, the quality of time spent on learning the modules is more critical than spending numerous days of superficial cramming of knowledge. The second is *tantum quantum* or literally, “in so far as.” Coming from the First Principle and Foundation in the Spiritual Exercises of St. Ignatius (Schineller, n.d.), we are reminded by this phrase to use (or rid) ourselves of anything that would aide (or inhibit) us from achieving our goal. Thus, to achieve the optimal program schedule, I recommend keeping the modules separate from the courses offered in the school of theology and to offer them at a time most conducive for the formands and/or young priests before they begin their new ministry.

**Separate from other courses.** Although in my review of the 2018 Loyola School of Theology’s (n.d.) curriculum (see Appendix K), and as mentioned in the interviews with the participants, there may be two specific courses (e.g., Special Moral Theology II: Christian Social Ethics and Introduction to Pastoral Methods) in which their syllabi could accommodate specific content that would be helpful for future school leaders, I would advise against the forcing of additional material in these core theology subjects. Not only will the specialized content be diluted with all the other topics that must be covered within the academic terms, but contextualized leadership formation would also be difficult to implement.



**Proximity to actual period of assignment.** Furthermore, as mentioned by some of the participants of the study, an issue for them was not just the lack of specific leadership training but the timing of when they would receive such training. A number of them mentioned that whatever training that they may have had that was related to leading schools were programs that they had attended early in their formation (i.e., OMIOD and pre-service regency training). That meant many of them still did not have the right context to appreciate and practice these skills. Moreover, because of the length of time that had passed between these training programs and their actual assignment in mission schools, most of the participants might already need a refresher course by the time they step foot in their schools.

Thus, an optimal time based on the academic schedule of the school of theology and the date when new assignments are announced would be five to eight weeks (e.g., one academic quarter)—the same length of time that most of this study’s participants had between the announcement of their assignment and their actual beginning of ministry in the mission high schools. Although the formal theoretical component of the leadership training may relatively be short, the induction period as well as on-going mentorship shall extend into their first term as school directors.

### **Content: The Specialized Educational Leadership Curriculum**

Some of the most relevant knowledge and skills that these seminarians would need to acquire in the final months of their basic formation pertain to apostolic leadership and effective site-based school management. Based on the information from the participants in this study and the objectives set forth earlier, the content of the intentional leadership modules would focus on the following specialized and context-specific curriculum as listed in Table 7.

Table 7  
*Specialized Educational Leadership Curriculum Content*

Topics	Description
1. History, philosophy, and context of the Jesuit education apostolate	1. Provides a comprehensive background of the Jesuit education apostolate, its development through the years, and its specific iteration in the context of mission high schools
2. Contextualized intercultural knowledge and socio-political power dynamics in ministering through education	2. Offers a reflective and critical look at the socio-cultural, economic, and local political dynamics in the Southern Philippines and how this particular context affects education policies and practices in mission schools; develops intercultural inclusivity, appreciation, and advocacy among future school leaders (e.g., engaging responsible ministries in IP communities)
3. Educational leadership skills in developing and communicating the Ignatian educational vision and mission	3. Enhances key leadership skills of setting and communicating a coherent organizational vision that directs the mission school towards its goals with the support of its various internal and external stakeholders
4. Asset generation and financial management and accountability	4. Instructs the participants to deal with financial matters from responsible fundraising to budgeting to financial recording and reporting
5. Networking and collaborating with external public and private institutions including the Department of Education and the local diocese	5. Introduces the external networks and systems that support the operations of a mission high school
6. Proficiency in school administration	6. Provides the basic tenets of on-site or school-based management including practical administrative skills such as running Board of Trustees meetings, creating strategic plans, and implementing facilities management plans

These special topics will be basic but sufficient enough to allow newly ordained priests leading mission schools to proceed with their leadership functions confidently and competently.

**Delivery: Teaching for and Learning as Adults**

I also recommend an improved seminary pedagogy or andragogy that is learner-centered, as educational leadership scholar Kathleen Brown (2004b, 2006) preferred to put it. The formators must recognize that as adult learners, Jesuit seminarians and young priests have a

nuanced way of acquiring knowledge and skills. Compared to children, adult learners, are more self-directed and in need of a clear rationale of what and why they are learning something (Brown, 2006; Collins, 2004; Lucilio, 2009). Moreover, adults are practical learners who wish to see the connection and application of their studies to their work or other responsibilities (Collins, 2004).

Because Jesuit leadership trainees as adult learners value experiential learning, an improved method of teaching and learning in the special modular leadership classes should also integrate experience (i.e., praxis) and reflection in strengthening the leadership cohort's educational leadership disposition and competence. Moreover, the leadership preparation component in the leadership classes must highlight the students' past professional and leadership backgrounds (before they entered the Society of Jesus or as regents, theologians, or young priests) as crucial and essential components of their formation. As a matter of andragogy, having the leadership modules closer to the actual dates of the future priests' missioning as school directors as well as having reflective, hands-on, problem-solving activities will also prove beneficial in the retention and immediate application of this knowledge and skills.

Appendix L presents examples of some of the fundamental adult learning principles and their application in the Jesuits' leadership preparation. Appendix M provides a sample module that employs these adult learning principles in developing intercultural inclusivity, appreciation, and advocacy among future Jesuit school leaders.

### **Assessment: Holistic Leadership Evaluations**

Cognizant of the value of relevant feedback on the formands' readiness for leadership functions outside the seminary, I recommend an adjustment in the manner of assessing the

leadership capacity of scholastics and newly ordained Jesuits. A multi-level assessment tool must be developed to provide crucial information to Jesuit superiors and formators on the readiness and competence of graduating Jesuit scholastics and young priests before they are sent to the mission schools to serve as administrators. These assessments, which are also meant to support the progress of the leadership cohort through timely and relevant feedback, can come in formative and evaluative types.

**Formative leadership assessments.** Besides the usual academic tests to check for comprehension and application of specific skills, the professors or formators teaching the leadership modular classes will need to conduct formative assessments of the Jesuit formands' growth in critical consciousness and disposition as enlightened by Catholic social teachings and Gospel values.

Three possible ways of engaging the specific formands in this self-evaluative activity can be through (a) cultural autobiographies, (b) life histories, or (c) reflection analysis journals (Brown, 2006). These activities are ways of reflecting on one's cultural heritage and how that can affect one's relationship with others and consequently, leadership styles. These assessment tools allow the participants to intentionally recognize how one's culture-based principles are formed in their family, community, and ethno-linguistic region and juxtapose them with other cultures' values in order to see not just differences but the richness in the cultural diversity (Brown, 2006). One concrete way of accomplishing this is to ask the trainees to remember and share specific incidents in their life that formed their notions and/or feelings about other people from a different culture or even social stature. The seminarians and recently ordained priests can even have conversations with current school directors regarding their experience of working in

an intercultural school setting. Through such structured activities, clericalism and implicit biases can be acknowledged and gradually addressed by the formands.

**Evaluative leadership assessments.** As the scholastics draw near the period of scrutiny for ordination and the young priests to their transfer of assignment, they should also undergo an evaluative leadership assessment. This structured and comprehensive evaluation can give them specific feedback on their leadership growth based on their leadership responsibilities from regency to theology (and early ordained ministry).

One simple yet effective leadership assessment tool that also gives the rubrics for evaluation comes from Ateneo de Manila University's Center for Organization Research and Development (Ateneo-CORD) (Ateneo de Manila University Center for Organization Research and Development [Ateneo-CORD], 2015). It is a leadership competency survey accomplished by the attendees of a biannual leadership workshop sponsored by the Jesuit Conference of Asia Pacific (JCAP). This survey is a tool to assess the Ignatian leadership capacities of formands and give them balanced and relevant feedback that comes from themselves, their superiors, peers, and direct reports. Appendix N shows the Ateneo-CORD Leadership Evaluation and Reflection Tool that can be adapted to suit the needs of scholastics in leadership formation. This assessment tool can be a notable improvement from the current cursory manner of assessing the scholastics' apostolic leadership abilities. It is a direct response to the recommendation of the participants of this study who had sought clear and timely feedback on their leadership competencies before their assignments in mission schools. Consequently, the results of this assessment can also provide ample data for the provincial superior who will ultimately decide on missioning the young Jesuits to be school directors.

## **Induction Periods and Ongoing Mentorship**

As an extension of their training period, I recommend that the leadership cohort go through a formal induction program that will also serve as a period of transition between the incoming school directors and their predecessors. This period would allow future school directors to have a hands-on experience of leading in the margins as they gradually take full responsibility in these institutions (Gordon, 2012; McKenzie et al., 2008). An essential component of this program is the availability of outgoing school directors who will initiate a systematic turn-over of responsibilities. Moreover, there should also be the support of chosen mentors who can edify and guide burgeoning educational leaders to prosper in their educational ministry during their initial term of service. The role of edification in leadership mentorship echoes Ignatian formation principles outlined by the Founder in the order's constitutions (Society of Jesus, 1996). It is crucial that first-time school directors feel that they have both the personal encouragement and institutional support that they need to succeed in the mission.

## **Securing Needed Formation Resources**

The existing structures of the Jesuit seminary program can generally accommodate the human and material resources needed for the proposed reforms. However, the Jesuit formators may need ample time and training to understand and appropriate the changes in the formation program. If lay professionals or professors, other than those already employed at the Loyola School of Theology (LST) are required to improve the delivery of the renewed leadership preparation content (i.e., financial accountability and human resource development), then Jesuit formators must request additional funding for this need.

The Jesuit leadership must also identify qualified Jesuit educational leaders who can mentor and coach novice school leaders as well. The Jesuit mentors who are knowledgeable and experienced must also be fully aware of the multifaceted circumstances of the mission schools in the Southern Philippines where the new educational leaders will be assigned, thus, asking current or outgoing school directors to be mentors to first-time school leaders may be ideal.

### **Responding to Possible Resistance**

One cannot merely challenge a well-established formation tradition with radical suggestions of reform and expect immediate results. Social interactions, both formal and informal, are crucial in shifting mindsets and creating a conducive atmosphere for change (Kezar, 2014).

Convincing the superiors and formators requires goodwill and carefully crafted data-driven proposals that respect the internal culture of the Jesuits. Moreover, introducing initiatives through a facilitative approach, which invites people to tap into shared values (i.e., service and spirituality), engages in open conversations, works through issues collaboratively, and develops contextualized solutions, is necessary (Owens & Valesky, 2015). Sincere dialogue that pay attention to the voices of various stakeholders on the ground (i.e., school directors in mission schools) are needed. Superiors and formators must be invited to participate in these discourses in a manner that transcends organizational constraints and creates instead, learning communities and communities of practice composed of “networks of people coming together around a shared interest to develop professionally” (Kezar, 2014, p. 97).

## **Institutional Evaluation**

To ensure accountability and continued improvement after a cycle of the leadership modules, the Jesuit formators must initiate a two-pronged institutional evaluation: (a) first on the modules' appropriateness within the epistemological purview of the whole Jesuit tradition of formation, and (b) the effectiveness of the content and delivery of modules in actually improving the competency of first-time mission high school directors.

The institutional evaluation can be akin to the Jesuit tradition of discernment in common or a deep communal reflection on the whole process to ascertain the openness not just to adapt the whole reform initiative in the leadership preparation of Jesuits but to continually improve on it as necessitated by the given context and demand of the stakeholders (i.e., the seminarians who will eventually take on leadership roles, their superiors, and formators).

The Jesuit formators must introduce and implement this careful evaluation to make the process of improving the aspect of leadership formation of Jesuits attainable, sustainable, and institutional while ascertaining that it remains grounded on the order's charism. After a proper assessment of the effectiveness of the proposed educational leadership modules, the formators may also want to consider expanding this program to include: (a) leadership training classes in other stages of the Jesuit formation (i.e., regency and first studies), (b) maximizing the learning time through online activities or classes, (c) extended internship period in mission schools during the intercessory academic terms, and (d) systematic data-base recording and tracking of the leadership growth of Jesuits from recruitment onwards.



## Suggestions for Future Research

Further studies are needed in the field of educational leadership preparation among the Catholic clergy (Boyle & Dosen, 2017; Fischer, 2010). This current study limited its scope to the experiences of Filipino Jesuit first-time school leaders in the mission schools. Also, the context of seminary formation that was discussed in this research was that of the Jesuit formation program in the Philippines only. It may then be profitable to engage in future studies that modify the scope and composition of participants as well as the research methodology and design.

### 1) Include Other Voices

**Lay collaborators in mission.** Although this phenomenological study gave a platform to listen to the voices of the Jesuit school directors, it is vital as well to hear the other voices from the mission schools, most especially of women religious and lay partners in mission. Future studies may want to include the perspectives of the Jesuits' lay colleagues in school administration and student instruction. The perceptions of other administrators and faculty members in mission schools, particularly the women's perspectives, can provide a richer context to the kind of school management necessary in high-needs, rural Catholic schools. Moreover, listening to their side of the story enriches the leadership narrative and descriptions already presented in this study. By listening to the lay partners in mission, one may see how Jesuit school leadership impacts them and their capacity to participate effectively in enriching, promoting and implementing the educational goals of Jesuit mission high schools.

**Jesuit leadership.** Similarly, the viewpoint of the Jesuit leadership, namely the formators and superiors who are in charge of the formation of young Jesuits and their eventual assignments in the various ministries, can be another focus for future studies. The leadership in the religious

order has a crucial role in determining the quality of Jesuit school leaders and, consequently, the impact they have on their ministries. By listening to the views of Jesuit leadership, future research may also be able to identify other means of supporting young Jesuits in their leadership journey. Furthermore, as keeper of Jesuit traditions, the order's leadership will also provide a unique perspective on the persistence of the status quo in Jesuit seminary formation and how to address such obstacles to reform.

## **2) Focus on Other Formation Aspects and Specific Contexts**

**Impact of mentorship.** As seen in the proposed framework, there are nine dimensions in the educational leadership preparation program that need attention. Future studies may want to focus on one or several of these dimensions and improve on what has been initially recommended in this study as a means of reforming the leadership training in the Jesuit seminary. An example of such a focus could be a study on the role and impact of a Jesuit mentorship program during the induction and first term of novice school directors.

**Contextualized action research.** Another study can come in the form of an action research. Jesuit school directors can engage in research within their respective mission schools to determine even more closely the educational leadership needs within their specific contexts. Being immersed in their situation, they may be able to identify particular social justice issues to which they can find answers by collaborating with their lay colleagues or fellow Jesuit educators. The results of their studies can then be shared to formators who can incorporate these in future leadership modules in the seminary.

Other religious orders or dioceses with rural mission schools can also conduct a similar study to evaluate if their leadership challenges are comparable to those identified in this study.

More importantly, this other group of Catholic educators can contextualize their research in practice in order to respond to their specific educational leadership reform needs.

### **3) Employ a Different Research Methodology**

Although the qualitative, phenomenological study served its purpose for this initial study, I suggest that other studies consider a quantitative or even a mixed-method approach. These approaches can build on the current research in order to see valuable correlations among the various factors that affect the educational leadership formation and experiences of novice school leaders. Future research, for instance, may try to look at the correlation between self-efficacy of new school administrators and the number of hours they had in internship and induction programs. Another quantitative research could be done to identify which among the apostolic leadership skills identified in this study are correlated to the improved learning of and care for marginalized students.

### **Conclusion: Jesuit Educators as Leaders for Social Justice**

The Catholic clergy, like the Jesuit priests assigned as educational leaders in the mission schools in the Southern Philippines, have an invaluable responsibility in the growth of their schools that seek to achieve educational excellence for all students (Branch et al., 2013; Schafer, 2004). Although top leadership is not the only determining factor in strengthening the educational institutions' capacity to resist the reproduction of injustices in their school communities, it is an integral element in this effort (Nygren, 2013). While collaborating with their colleagues, the school leaders' efforts to uphold principles of inclusivity and justice are vital in making sure that such schools do not degenerate into tools of oppression for the dominant

culture and neoliberal ideologues (Freire, 2005; Gleeson, 2015; Hoppey & McLeskey, 2013; Young, 2013).

Social justice in the mission high schools emanates from the school leaders' indubitable missionary fervor. It is propelled further by their intentional focus and concern for those who suffer systemic inequities in "educational opportunities and outcomes" (Furman, 2012, p. 194). The work of educating their students is a vocation to make a positive difference in their students' lives and communities. Their purposeful manner of leadership that is rooted in a faith that upholds justice ought to breathe "meaning and life into [their] educational practices" (Bogotch, 2000, p. 153). Future priests who will receive this responsibility in Catholic schools must be held particularly accountable, and thus, be exceptionally prepared for this transformative ministry.

As Pope Francis once emphasized in a colloquium for religious superiors: The seminary formation ought to be "a work of art, not a police action" where formands "grit their teeth, try not to make mistakes, follow the rules, smiling a lot, just waiting for the day" of their ordination and missioning (McGarvey, 2014, p. 1). The first Jesuit Pope emphatically underscored that the seminary must truly transform the seminarians' hearts to serve selflessly, "otherwise [the Church] is creating little monsters. And then these little monsters mold the people of God" (McGarvey, 2014, p. 1).

The Jesuit seminary formation has far more significant consequences than merely ascertaining that the formands' personal and individual actions are moral and upright upon their ordination. Filipino Jesuits are formed for transformative missions. The true test for the Church's future shepherds, then, shall be outside the confines of the scholasticate. It will be in the lives of

their flock at the peripheries of society. In a specific way, it will be in the lives of their students in the margins.

Simply put, “social justice leadership is a critical building block in the educational equity [and humanizing] project” (Marshall, Young, & Moll, 2010, p. 315 as cited by Furman, 2012) in the Jesuit-run mission high schools. Jesuit educational leaders must be ready and able to respond to this calling. Thus, the Jesuit formators must bridge the leadership formation gap in the seminary.

## EPILOGUE

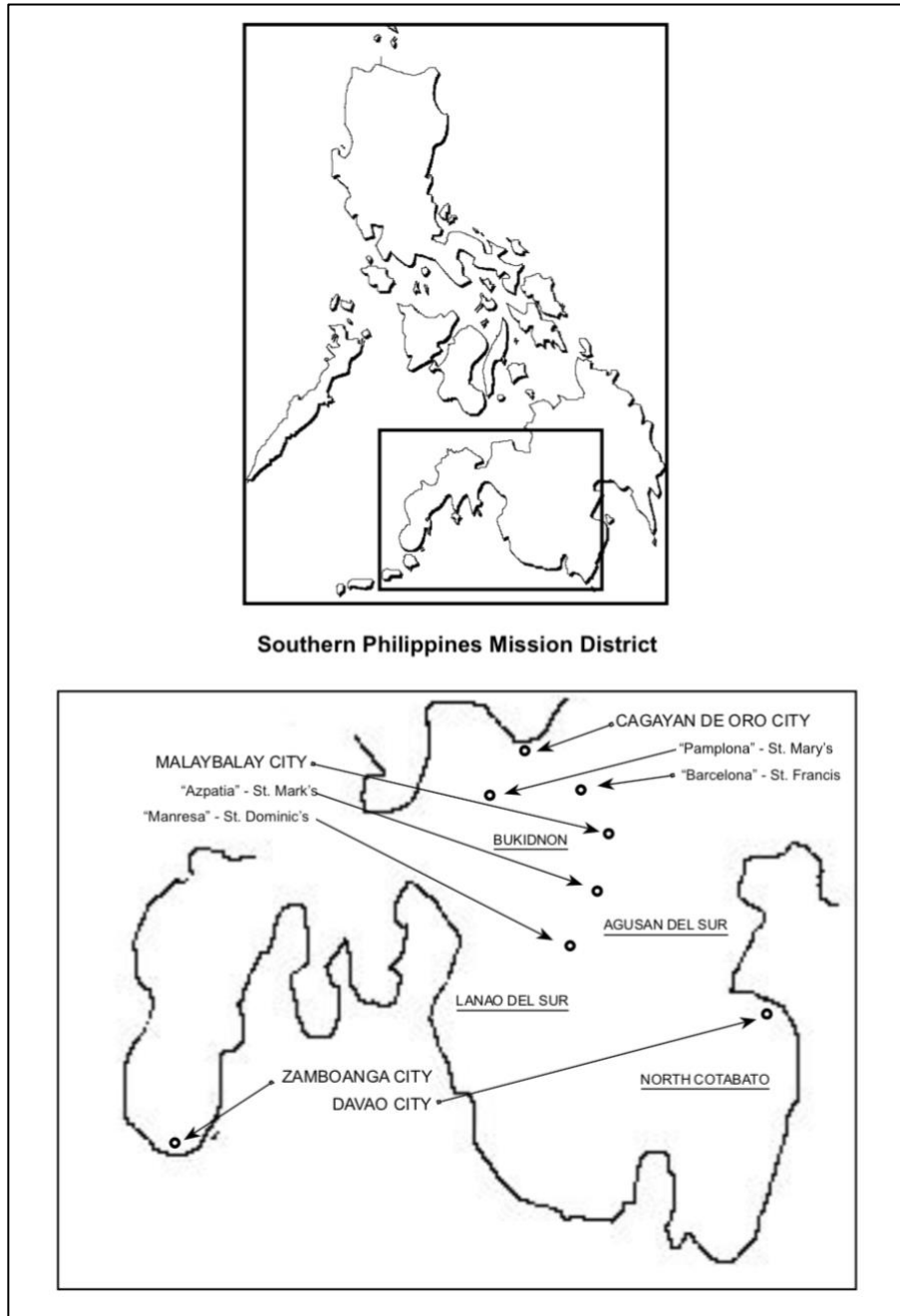
### Lead from the Margins

Six years ago, I experienced how it was to be an “unprepared” leader in a mission school and questioned my capacity to be a transformative leader. Now, that I have come to the end of my three-year doctoral journey here at Loyola Marymount University, I am grateful to the School of Education for ardently teaching and inspiring me to educate and lead from a social justice perspective. I have become more aware of the intricate connectedness of learners and educators and the social responsibility that comes with authority. This critical consciousness has become a liberating spirit to make a difference in our schools. But I realize that this responsibility is not just mine. It is a responsibility that I share with others, whether they may be at the centers or fringes of the education ministry. Lest we fall into despair amidst the injustices surrounding us, educational leadership practitioners and scholars from across the world need to lean on and learn from each other. This can become a collective “*pananagutan*.”

Pananagutan comes from the Tagalog word “*sagot*.” Other than literally meaning “to respond,” Filipinos also use it to say “*Sagot kita*,” or “I got your back.” Now more than ever, educational leaders and learners from diverse contexts can be partners with one another, looking after each other’s back. We need each other because our lives make sense, not in isolation, but only when shared generously with others, for others. Thus, no matter how tremendous the structural obstacles may be, we can chip away at them through our collaborative minds that seek the truth, passionate hands that work for justice, and tireless hearts that bless with kindness. This is our *pananagutan* to one another and to our students: to be critical, competent and compassionate leaders for and with others. And this is how we can lead from the margins.

## APPENDIX A

### Map of the Southern Philippine Mission District



*Note:* This map is based on the information from "Southern Philippine Mission District" by the Jesuit Philippine Province, 2016b, *Catalogus Provinciae Philippinae Societatis Iesu 2016*, Curia (Ed.). Quezon City: Philippine Province Curia of the Society of Jesus, p. 13.

## APPENDIX B

### Pre-interview Questionnaire Protocol (Google Forms screenshots)

#### Pre-interview Questionnaire

Thank you for consenting to be part of this study.

As agreed upon in the informed consent form, all your responses will be kept confidential. Pseudonyms (for you and your institution) will be used to protect your privacy and identity.

This pre-interview questionnaire is meant to obtain information about you that is not listed in our Jesuit Catalogus. This background information will also assist me in my subsequent one-on-one conversation with you.

Kindly respond to the following questions/items as completely and candidly as you can. You do not have to give answers in grammatically correct sentences. Bullet points will do.

This questionnaire will take between 20 to 30 minutes to accomplish. Thank you.

1. **Email address \***

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#### About You

2. **Please state your full name.**

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3. **If you wish to give your own pseudonym for this study, what pseudonym would you like to use for yourself (e.g., Fr. Arturo)? If this pseudonym is already in use for this study, the researcher will ask you to give another name the next time he contacts you. If you have no preference, you may leave this blank and skip to the next question.**

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#### Before Becoming a Jesuit

4. **1. What was your highest educational degree BEFORE entering the Society of Jesus?**

*Mark only one oval.*

- High school
- Vocational
- College
- Masters
- Doctorate
- Other: \_\_\_\_\_

5. **2. If you have a college/masters/doctorate degree before becoming a Jesuit, what was your field of CONCENTRATION (i.e., major in college)?**

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6. 3. Did you have a chance to **WORK** professionally before you entered the Society of Jesus?

*Mark only one oval.*

Yes

No

7. 4. If you did get to work professionally before becoming a Jesuit, could you give a brief description of the kind of **EMPLOYMENT** you had (e.g., working as an brand manager for a multi-national company)?

\_\_\_\_\_

8. 5. How has your **PREVIOUS** academic/professional **BACKGROUND** helped you in your Jesuit ministries, particularly during your first assignment(s) as a newly-ordained priest?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Your Experience in the Mission Schools

9. 6. Did you expect that the Provincial Superior would assign you as a school director/president of a mission high school immediately or soon after your ordination to the priesthood?

\_\_\_\_\_

10. 7. When was the first time that you were told by the Provincial Superior that you'll be a school director/president of the mission school? (You could give an exact year or the number of months/years in relation to your actual assignment—i.e., "I was told in 2014, on my ordination day, just 1 month before I got to the mission school.")

\_\_\_\_\_

11. 8. Could you please describe your feelings or initial reactions when you were told that you would lead a school in the Jesuit mission district?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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12. 9. Based on your experience in the mission district, what do you consider are the most important responsibilities of a Jesuit priest assigned as a school director of a mission high school? Please list at least three (3):

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## Educational Leadership in the Margins

### The Role of a Jesuit School Director

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The International Commission on the Apostolate of Jesuit Education (1986) outlined the leadership function of a school president or director as follows:

"The role of the director is that of an apostolic leader. The role is vital in providing inspiration, in the development of a common vision and in preserving unity within the educational community. Since the world-view of Ignatius is the basis on which a common vision is built, the director is guided by this world-view and is the one responsible for ensuring that opportunities are provided through which the other members of the community can come to a greater understanding of this world-view and its applications to education. In addition to this role of inspiration, the director remains ultimately responsible for the execution of the basic educational policy of the school and for the distinctively Jesuit nature of this education." (p. 333)

13. 10. How do you see yourself in relation to this description of the role of a Jesuit school director, particularly when you started your ministry in the mission school you were assigned to lead as a 'baby priest'?

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14. 11. What were the key socio-cultural, economic, even political issues that you encountered as a new school director/president in the school you are/were leading in the mission district?

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15. 12. What kind of knowledge or information did you need to identify, analyze, and respond to these key issues?

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16. 13. How did you try to address these key issues during your first years as school director/president of your mission high school?

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17. 14. What is your assessment of yourself in addressing these key issues?

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### Your Jesuit Scholastic Formation

18. 15. What additional educational degrees did you earn as a Jesuit SCHOLASTIC PRIOR TO YOUR ORDINATION to the priesthood? (You may have multiple answers.)

*Check all that apply.*

- Bachelor of Arts (College)
- Bachelor of Science (College)
- Master of Art in Philosophy
- Master of Art in Theology
- Master of Art in Pastoral Ministries
- Bachelor of Sacred Theology (STB)
- Licentiate of Sacred Theology (STL)
- Doctor of Sacred Theology (STD)
- Other: \_\_\_\_\_

19. 16. Which stage(s) of your basic Jesuit formation did you find most helpful when you were missioned as a young priest assigned as a school director of a mission high school? (You may have multiple answers.)

*Check all that apply.*

- Novitiate
- Juniorate
- Philosophy or First Studies
- Regency
- Theology
- Other: \_\_\_\_\_

20. 17. Why do you say that this/these stage(s) of Jesuit basic formation was/were most helpful for you when you were assigned as a school director/president of a mission high school?

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21. 18. Where was your regency assignment? (If you had multiple places of assignments during your regency formation, please list all.)

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22. 19. What were your main responsibilities during your regency formation?

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23. 20. How long was your regency assignment?

*Mark only one oval.*

- Less than a school year
- One (1) School year
- Two (2) School years
- Three (3) School years
- Four (4) School years
- Five (5) School years
- More than five (5) school years

24. 20. To the best of your recollection, what training programs since the time you entered the Society of Jesus were most relevant and helpful for you in leading your respective mission high school?

*Check all that apply.*

- Jesuit Communications (JesCom) classes on video production
- OMIOD (Ateneo de Manila's Office of Mission and Identity) trainings in project management
- Pre-regency training on classroom management and the Ignatian Pedagogical Paradigm
- In-service faculty training during your regency assignment
- Regents' Summer Enrichment Programs (ReSumE)
- JBEC's Workshop on Ignatian Spirituality for Educators
- JBEC's Workshop on Ignatian School Leadership
- JCAP Leadership Workshop
- JCAP Scholastics and Brothers' Circle
- East Asia Theological Encounter Program (EATP)
- Other: \_\_\_\_\_

25. 21. Which part of your basic Jesuit formation in terms of **CONTENT** (i.e., subject areas or curriculum that you were being taught) could have been **IMPROVED** to prepare you better for the educational ministry in a mission high school? Please give an example. Why do you say so?

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26. 22. Which part of your basic Jesuit formation in terms of manner of **TEACHING** or **PEDAGOGY** (i.e., lectures, summer immersions, thesis writing, etc.) could have been **IMPROVED** to prepare you better for the educational ministry in a mission high school? Please give an example. Why do you say so?

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27. 23. Which part of your basic Jesuit formation in terms of **EVALUATING YOU** (i.e., Ad Auds, comprehensive Philosophy/Theology Exams, formation objectives self-assessment, peer evaluation, informationes, manifestation of conscience, etc.) could have been **IMPROVED** to prepare you better for the educational ministry in a mission high school? Why do you say so?

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**Thank you.**

You have completed the pre-interview questionnaire. I will keep in touch with you to schedule our one-on-one interview, focus group discussion, and on-site observation.

Rest assured of my prayers for you and your ministry.

Send me a copy of my responses.



(Google Forms (<https://www.google.com/forms/about/>)).

## APPENDIX C

### Semi-structured Interview Protocol

#### Introductory Protocol

*Good day. Thank you for agreeing to meet with me today. I will be recording our conversation so that it could be accurately transcribed. I will also be jotting down notes along the way. Please be assured that I will be the only one privy to the audio recordings which will be eventually destroyed a year after the dissertation project has been approved. I would also like to remind you of the essential contents of the informed consent form that you have signed: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) I do not intend to inflict any harm.*

*I have planned this interview to last no longer than an hour and half. During this time, I have several questions that I would like to cover, but we will make this conversation as free flowing as possible. May I request that, as much as possible, that you speak in English in response to my questions?*

*Before we continue, do you have any questions for me?*

*Thank you for your agreeing to participate.*

#### Introduction

*I have purposely chosen you to speak with me today because you have been identified as someone who has a great deal to share about your educational leadership experiences in the mission school as well as the Jesuit training that led you to this ministry. My research project as a whole, focuses on drawing meaning from your leadership experiences and seeing their implications to our Jesuit formation program.*

*This study does not aim to evaluate your techniques, skills, judgments, or experiences. I wish, however, to learn more about the particular needs of a young Jesuit educational leader in the mission district, and hopefully make recommendations to improve on our Jesuit scholasticate leadership preparation program.*

#### A. Preliminary Questions:

- 1) How long have you been here in the mission district (if current school director) and how many years have you been as school director? OR How long since you've been transferred from the mission district to your current assignment (if former school director)?
- 2) How do you feel about your current/past assignment as school director?

B. On Research Question #1: What are the experiences of educational leadership successes and challenges of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines?

- 1) How would you describe your leadership experiences in the mission school from the moment you learned about your assignment up to this day?
- 2) What, do you think, has been your most significant successes as a school director?
- 3) What, to your recollection, has been your most difficult struggles as a school director?
- 4) What do you consider to be the mission of a Jesuit sponsored high school here in the Southern Philippine Mission District?
- 5) In what specific ways have you seen yourself exercising the transformational dimension of Jesuit education—specifically that of promoting faith that does justice in the education of those in the peripheries of society?

C. On Research question #2: What are the perceptions of newly ordained Jesuit priests assigned as directors of Jesuit mission high schools in the Philippines on how their seminary formation contributed to their preparation as school leaders in rural schools serving mostly economically poor and culturally marginalized students?

- 6) How has your Jesuit seminary formation influenced your critical awareness of the social realities that you faced/uncovered in leading a school for those in the margins?
- 7) What conceptual knowledge and skills did you learn from our seminary formation that helped you address these issues?
- 8) Did you have to learn any concepts and practical skills school leadership as you led your school?
- 9) Looking back, what is your over-all perception and assessment of how our Jesuit formation contributed in preparing you for your leadership role in a rural mission school serving economically poor and culturally marginalized students?

#### Conclusion

*Thank you for your candid responses. Do you have any questions for me?*

*I will be writing a preliminary summary of our conversation. As soon as I am ready, I will share it with you for your verification. Again, thank you for participating in this study.*

## APPENDIX D

### Focus Group Discussion Protocol

#### Welcome and Introduction

*Good day. Thank you all for agreeing to meet with me today. I will be recording our discussion so that it could be accurately transcribed. I will also be jotting down notes along the way. Please be assured that I will be the only one privy to the audio recordings which will be eventually destroyed a year after the dissertation project has been approved. I would also like to remind you of the essential contents of the informed consent form that you have signed: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) I do not intend to inflict any harm.*

*The purpose of this focus group discussion is to revisit some of the questions in the individual interviews and gain additional insight about your leadership experiences and the training that you received and the formation that you feel is needed for the educational ministry here in the mission district.*

*I have planned this focus group discussion to last no longer than an hour and half. During this time, I have several questions that will serve as prompts. Feel free to jump into the conversation as we abide by the following norms:*

- a. Speak in English as much as possible
- b. Speak for yourself and out of your own experience; there are no right or wrong answers
- c. Limit side conversations
- d. Let others finish before you talk
- e. You may ask questions to me or to one another
- f. Share concrete examples if possible
- g. Keep the conversation confidential
- h. Keep the conversation light and free flowing

*Do you have any questions for me before we continue? Thank you once again for agreeing to participate.*

#### A. Leadership Experience

1. Could you share a brief story/anecdote about any of your memorable experience that inspired or challenged you as a school director in your mission school?



B. Formation Impressions and recommendations

2. If you could go back to your scholasticate/seminary formation, what would you have paid greater attention to in order for you to have come more prepared for your leadership role in the mission school?
3. If asked by the provincial superior or the delegate for formation, what advice could you give him/them to make sure that newly ordained Jesuit priests arrive in the mission schools with the right set of competencies to lead schools for the economically and culturally marginalized?

Conclusion

*Thank you for your candid and lively discussion. Do you have any questions for me? I will be writing a preliminary summary of our discussion. As soon as I am ready, I will share it with you for your verification. Again, thank you for participating in this study.*

## APPENDIX E

### On-site Participant Observation Protocol

Objective: By being on-site with a Jesuit school director currently assigned in a mission school I hope to observe during the course of a day or so, how he manages his day at the school, interacts with the faculty and other administrators, and relate with students and even parents. The timing chosen is the period of days that lead to the opening of classes and a few days after.

Procedure:

1. After having scheduled with a current director my visit to his school site, I will “shadow” him during his activities for the day.
2. When the opportunity arises, I will allow him to introduce me to any of those whom he will interact with (i.e., faculty, administrators, students, and parents) as: “A fellow Jesuit doing his studies on educational administration...” and as someone “interested in learning how I (the school director) go about my day-to-day activities in our school.”
3. I will be unobtrusive the whole time that I am with the participant. When I make notes, I will have to be discreet and not draw attention to myself.
4. The following grid will be my guide in what I need to observe:

	Behavior	Skills	Conversation Content
Interaction with Stakeholders			
→ with fellow administrators			
→ with faculty			
→ with students			
→ with parents			
→ other people in the community			
	Behavior	Skills	Conversation Content
School Management			
→ presiding at meetings			
→ addressing specific concerns about school operations (i.e., finances, HR, and legal matters)			
→ handling conflicts (if any)			
→ handling a crisis situation (if any)			
→ making decisions			

## APPENDIX F

### Letter to Request Access to the School Sites

Dear Fr. Superior,

Pax Christi,

I write this letter to respectfully ask permission from you to grant me access to conduct my dissertation study in our four Jesuit mission high schools, namely (a) St. Rita's High School (b) St. Francis' High School, (c) St. Dominic's High School, and (d) St. Mark's High School.

The research employs multiple qualitative data gathering tools that intends to look at the predicament of novice Jesuit school directors and see how a contextualized appreciation of their leadership experiences in schools for underserved students in a cluster of mission high schools in a rural region in the Philippines can guide the improvement of the formation of Filipino Jesuits who may soon be sent to lead similar schools in the peripheries.

I will request the four Jesuits under your supervision in the mission district who are serving as school directors to participate in this study through the following ways:

- (1) Answer a pre-interview questionnaire
- (2) Engage in a one-on-one interview for about an hour and a half
- (3) Participate in a focus-group-discussion (FGD)
- (4) To be the subject of an observation on a specified date at the school site
- (5) To provide non-confidential documents for review such as the
  - (a) minutes of meetings where the school director presided (such as but not limited to the following: (a) Board of Trustees meetings and (b) Faculty Meetings).
  - (b) scholastic record pertinent to the school director's leadership preparation (i.e., Transcript of Records from Ateneo de Manila, Loyola School of Theology or any similar academic institutions)

You will also see attached to this a pro forma letter (pages 2-3) that indicates that you have read the cover letter and have given me permission (indicated by your signature) to perform my data gathering activities in the four school sites of the Jesuit Mission District. Kindly print it on your official letterhead, sign and scan the document, and send it to me electronically via email ([ernaldsj@yahoo.com](mailto:ernaldsj@yahoo.com) or [gandal@lion.lmu.edu](mailto:gandal@lion.lmu.edu)) by February 12, 2019.

Thank you so much, Fr. Superior. I look forward to your assistance.

God bless.

Ernald Andal, S.J.

February 18, 2019

Fr. Guillrey Anthony M. Andal, S.J.  
Doctoral Student  
Educational Leadership for Social Justice  
School of Education, Loyola Marymount University

Dear Ernard,

Peace.

I have read your letter of request and have given it due consideration.

This is to allow you access to the four school sites in the Jesuit Mission District from May 3 to June 21, 2019.

I am aware that for this study you will employ multiple qualitative data gathering tools, to look at the predicament of novice Jesuit school directors and see how a contextualized appreciation of their leadership experiences in schools for underserved students in a cluster of mission high schools in a rural region in the Philippines can guide the improvement of the formation of Filipino Jesuits who may soon be sent to lead similar schools in the peripheries. I have also read and approved for use in the school sites the protocols that you will be using in gathering the qualitative data.

I also understand that you will be requesting from each participant (i.e., current school directors of the mission high schools) their written consent to participate as follows:

- (1) Answer a pre-interview questionnaire
- (2) Engage on a one-on-one interview for about an hour and a half
- (3) Participate in a focus-group-discussion (FGD)
- (4) To be the subject of an observation on a specified date at the school site
- (5) To provide non-confidential documents for review such as the
  - (a) minutes of meetings where the school director presided (such as but not limited to the following: (a) Board of Trustees meetings and (b) Faculty Meetings).
  - (b) scholastic record pertinent to the school director's leadership preparation (i.e., Transcript of Records from Ateneo de Manila, Loyola School of Theology or any similar academic institutions)

I recognize that the amount of time that each participant may vary as specified in the data gathering protocols (e.g., 450 minutes as average total). Nonetheless, you will make sure to coordinate their availability individually. I understand that if I have any further questions, comments or concerns about the study or the informed consent process, I may contact Dr. David Moffet, Chair, Institutional Review Board, Loyola Marymount University, 1 LMU Drive, Los Angeles, CA 90045-2659 or by email at David.Moffet@lmu.edu.

Thank you for informing me of the rights of the participants in the study who are under my care as the local superior of the Jesuit Mission District. I look forward to seeing you in May.

Fraternally in Christ,

Fr. Superior, S.J.  
Local Superior, SPMD

## APPENDIX G

### Participant's Informed Consent Form

I volunteer to participate in a research project conducted by Fr. Guillrey Anthony M. Andal, S.J. from Loyola Marymount University.

I understand that the project is designed to gather information about the educational leadership experiences of Jesuits who have served / are serving as school directors/presidents in the mission schools in the Southern Philippines.

I will be one of eight Jesuits chosen to participate in this project.

My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty.

If I feel uncomfortable in any way during the interview, discussion, or the observation sessions, I have the right to decline to answer any question or to end the interview, discussion, and/or observation.

My participation in this research project involves the following:

- (1) Answering a pre-interview questionnaire
- (2) Engaging on a one-on-one interview for about an hour and a half. Notes will be written during the interview. An audio tape of the interview which will later on be transcribed will be made. Once available, a summary of the interview will be presented to me for my verification.
- (3) Participate in a focus-group-discussion (FGD). An audio tape of the FGD which will later on be transcribed will also be made. Once available, a summary of the FGD will be presented to me for my verification.
- (4) If I am a current school director, I allow Fr. Andal to be observe me on a specified date at the school site and its peripheries as I go about my regular school administrative activities. When the occasion presents itself, I will introduce him to any of those I interact with during this observation session as "A fellow Jesuit doing his studies on educational administration..." and as someone "interested in learning how I (the school director) go about my day-to-day activities in our school."
- (5) Allow access to certain non-confidential documents in the school such as the minutes of meetings where I presided (such as but not limited to the following: (a) Board of Trustees meetings and (b) Faculty Meetings). In addition, I also allow Fr. Andal to receive a copy of my scholastic record pertinent to my leadership preparation (i.e., Transcript of Records from Ateneo de Manila, Loyola School of Theology or any similar academic institutions).

I understand that the researcher will not identify me by name in any reports using information obtained from this study. Fr. Andal guarantees my confidentiality as a participant in this study. Moreover, only Fr. Andal will have full access to raw notes or transcripts. This precaution will prevent my individual comments from having any negative repercussions on me.

I understand that this research study has been reviewed and approved by Loyola Marymount University's Institutional Review Board (IRB) for Studies Involving Human Subjects. For research problems or questions regarding subjects, the Institutional Review Board may be contacted through this contact information: Julie Paterson, LMU's Senior Compliance Coordinator at +1-310-258-5465 or via email at [julianne.paterson@lmu.edu](mailto:julianne.paterson@lmu.edu).

I have read and understood the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study.

I have also been given a copy of this consent form.

\_\_\_\_\_  
Signature over Printed Name of the Participant

Date: \_\_\_\_\_

## APPENDIX H

### Sample Evaluation Form for Jesuit Scholastics in Regency Formation

#### Evaluation Form for First Year Regents (Jesuit Philippine Province, 2005)

Evaluator: \_\_\_\_\_ Position \_\_\_\_\_

Regent Being Evaluated: \_\_\_\_\_

Please answer the following questions:

1. How do you see the regent in terms of his AREAS OF STRENGTH (e.g. character, abilities, capacities, special gifts)?
2. What are KEY AREAS OF WEAKNESS AND LIMITATION which he needs to improve on? In what aspects of Jesuit life can he achieve more meaningful growth and integration?
3. Are there any AREAS OF CONCERN that should be brought to the regent's attention?

Your answers will be of great help to the regent concerned for his progress in the regency formation. Many thanks.

Please submit to Fr. Rector, S.J., Loyola House of Studies, Ateneo de Manila Campus, Loyola Heights, Quezon City not later than March 20, 2009 Friday.

## APPENDIX I

### Sample Evaluation Form: Formation Objectives for a Jesuit Scholastic

Guidelines for scholastics' formation objectives setting in preparation for manifestation of conscience with Fr. Rector at the Theologians' Subcommunity (Jesuit Philippine Province, 2005).

What is to be done?

From this day, to the time of the actual manifestation, take some time to pray over the matter presented here. Then, when you are ready, begin writing. [It would be great if you can integrate it in the weekend recollection.]

Formation objectives are placed within the grid following the format below. It could be written out in bullet-points style [for an easier read].

[1] AREAS OF FORMATION	[2] MY CURRENT CONDITION	[3] WHERE I WANT TO MOVE BY END OF SCHOOL YEAR In behavioral terms	[4] RESOURCES & ASSISTANCE I NEED
1. PRAYER & SPIRITUAL LIFE			
2. STUDIES & ACADEMIC LIFE			
3. COMMUNITY LIFE			
4. APOSTOLIC LIFE & HOUSE ASSIGNMENTS			
5. VOWS			
6. JESUIT IDENTITY & VOCATION			
7. OTHER AREAS OF CONCERN			

COLUMN [1] are the six (6) main areas or elements in our formation program. They cover the following aspects:

AREAS OF FORMATION	ASPECTS COVERED
1. PRAYER & SPIRITUAL LIFE	Prayer practices, sacramental life (Eucharist, Reconciliation), examen, spiritual direction, spiritual reading, spiritual conversation
2. STUDIES & ACADEMIC LIFE	Attendance of classes, class performance, submission of requirements, student & intellectual life
3. COMMUNITY LIFE	Subcommunity structures (litcom, manualia, rec time, etc.), LHS community life (e.g. interaction with other members), relationships, presence, time with community
4. APOSTOLIC LIFE & HOUSE ASSIGNMENTS	Performance, capacity to work with fellow Jesuits and lay colleagues, quality and constancy of work, pastoral life
5. VOWS	Practice, growth, issues; relationships
6. JESUIT IDENTITY & VOCATION	Deeper appreciation of Jesuit identity and vocation, desire for priesthood, identification with the Province & Society

7. OTHER AREAS OF CONCERN	Time management, balance and integration of different areas of concern, general state of well-being
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In COLUMN [2] make a description of your current condition per area of formation. The key question to ask is:

*How do I see myself now with respect to e.g. my community life?*

You may answer this question by examining your attitudes, knowledge, skills, and practices. It can be done through the following:

- Assessment or evaluation of yourself in terms of strengths and weaknesses per aspect. Examples are the following:

[1] AREAS OF FORMATION	[2] MY CURRENT CONDITION	[3] WHERE I WANT TO MOVE BY END OF SCHOOL YEAR In behavioral terms	[4] RESOURCES & ASSISTANCE I NEED
PRAYER & SPIRITUAL LIFE	<ul style="list-style-type: none"> <li>• Regularity in daily examen</li> <li>• Unable to sustain formal prayer</li> </ul>		
STUDIES & ACADEMIC LIFE	<ul style="list-style-type: none"> <li>• Openness to study theology</li> <li>• Difficulty in reading long philo articles</li> </ul>		

- Identifying critical aspects, issues, problem areas, or needs which you think demands special attention, care or vigilance, as shown by the following examples:

[1] AREAS OF FORMATION	[2] MY CURRENT CONDITION	[3] WHERE I WANT TO MOVE BY END OF SCHOOL YEAR In behavioral terms	[4] RESOURCES & ASSISTANCE I NEED
COMMUNITY LIFE	<ul style="list-style-type: none"> <li>• Tendency to keep to myself during rec time</li> <li>• Inability to reach out to other subcommunities</li> </ul>		
VOWS	<ul style="list-style-type: none"> <li>• Vow of poverty: need greater control in spending</li> <li>• Vow of chastity: need time for physical exercise</li> </ul>		

In COLUMN [3], imagine where you would want to be at the end of the school year, in the same key areas. In this part, you are not expected to reach for the stars and come out a completely different and new man. Rather, the task is to identify key areas where you would like to see some changes. The key question to ask is:

*What changes do I want to see happening in e.g. my community life at the end of the school year?*

It is necessary to answer this question in terms that are *specific* (vs. general), *concrete* (vs. abstract), and *behavioral* (vs. unobservable). By translating your vision of yourself in these terms, you and the Rector will be able to make more focused, observable, and even measurable evaluations. This will also serve as indicators of success and



performance in each area of formation. Identifying such clear targets can also help develop and monitor new behaviors desired.

The following are examples based on the examples above:

[1] AREAS OF FORMATION	[2] MY CURRENT CONDITION	[3] WHERE I WANT TO MOVE BY END OF SCHOOL YEAR In behavioral terms	[4] RESOURCES & ASSISTANCE I NEED
PRAYER & SPIRITUAL LIFE	<ul style="list-style-type: none"> <li>• Regularity in daily examen</li> <li>• Unable to sustain formal prayer</li> </ul>	<ul style="list-style-type: none"> <li>• 15-min twice a day examen</li> <li>• 30-min morning prayer</li> <li>• Twice a month spiritual direction</li> </ul>	<ul style="list-style-type: none"> <li>• My novitiate SD for continuity</li> </ul>
STUDIES & ACADEMIC LIFE	<ul style="list-style-type: none"> <li>• Openness to study philosophy</li> <li>• Difficulty in reading long theological articles</li> </ul>	<ul style="list-style-type: none"> <li>• 1.5 hours study &amp; reading time each night</li> <li>• TV-watching time reduced to 50%</li> <li>• Do outlines of major reading assignments</li> </ul>	<ul style="list-style-type: none"> <li>• Group study sessions among theologians' batch</li> <li>• Advice from Prefect of Studies</li> </ul>
COMMUNITY LIFE	<ul style="list-style-type: none"> <li>• Tendency to keep to myself during rec time</li> <li>• Inability to reach out to other subcommunities</li> </ul>	<ul style="list-style-type: none"> <li>• Interact with bros during rec time; avoid reading papers</li> <li>• Engage in mealtime conversations with fathers &amp; other bros</li> </ul>	<ul style="list-style-type: none"> <li>• Regular feedback from some JP vice-superior &amp; bros</li> </ul>
VOWS	<ul style="list-style-type: none"> <li>• Vow of poverty: need greater control in spending</li> <li>• Vow of chastity: need time for physical exercise</li> </ul>	<ul style="list-style-type: none"> <li>• Increase in monthly savings from allowance</li> <li>• Twice a week exercise at Moro</li> </ul>	<ul style="list-style-type: none"> <li>• New running shoes</li> </ul>

In COLUMN [4] the key questions to ask are:

*What resources (personal, material, structural) do I need to accomplish those which I have set in COLUMN [3]?  
What assistance will I need, and from whom?*

## APPENDIX J

### Loyola School of Theology (LST) <sup>16</sup> Statistics for the Academic Years 2017 to 2019

	Academic Year 2018-2019	Academic Year 2017-2018
Fulltime Jesuit Professors	17	14
Fulltime non-Jesuit Professors	2	2
Part-time Jesuit Professors	10	9
Part-time non-Jesuit Professors	34	39
Jesuit Students (Filipino and Foreign*)	62	64
Filipino Jesuits in Years 1/2/3/4	4/2/3/1	2/1/1/3
Filipino Jesuits ordained in Yr. 4	1 out of 1 (100%)	1 out of 3 (33.33%)
Newly ordained Filipino Jesuits assigned in mission parish/school after Yr. 4	1 out of 1 (100%)	1 out of 1 (100%)
Ave. age upon ordination	37 years old	37 years old
Non-Jesuit students	417	392
Seminary track-S.T.B.	201	204
M.A.	130	165
Licentiate (S.T.L.)	35	38
Doctoral S.T.D./Ph.D./D.Min.	43	32
Special certificate programs	72	62
<i>Note.</i> Foreign Jesuit students come from Jesuit Provinces/Regions in Asia Pacific, South Asia, and Africa. They are not yet included in leadership preparation modules recommended in this study. The data have been collected from the “ <i>Catalogus Provinciae Philippinae Societatis Iesu 2018</i> ” and “ <i>Catalogus Provinciae Philippinae Societatis Iesu 2019</i> ” both by Jesuit Philippine Province, 2018, 2019, Quezon City: Philippine Province Curia of the Society of Jesus.		

<sup>16</sup> The Loyola School of Theology (LST) is located inside the campus of the flagship university of the Jesuits in the Philippines: Ateneo de Manila University. It is located in the highly urbanized area of Quezon City, Metro Manila, Philippines. It was founded in 1965. It has a full-time faculty composed primarily of Jesuits supported by lay professors as well as other men and women of various other religious orders. LST caters to Jesuits and non-Jesuit students, Filipinos and foreign students. LST awards canonical degrees of Baccalaureate in Sacred Theology (STB), Licentiate in Sacred Theology (STL), and Doctorate in Sacred Theology (STD). With its affiliation to the Graduate School of the Ateneo de Manila University, LST also offers civil graduate degrees in theology, scripture, and pastoral ministry.

## APPENDIX K

### LST Theological Studies Program

Below is the 2018 four-year theological studies curriculum at the Loyola School of Theology (LST, n.d.):

<b>First Year</b>	
<b>First Semester</b> <ul style="list-style-type: none"> <li>• Revelation and faith.</li> <li>• Fundamental moral theology</li> <li>• Christian worship</li> <li>• Pentateuch studies</li> <li>• Church history I: first to 13th C.</li> <li>• Methods and materials of research: writing</li> </ul>	<b>Second Semester</b> <ul style="list-style-type: none"> <li>• Prophets of Israel</li> <li>• Scripture-Tradition-Magisterium</li> <li>• Creation and eschatology</li> <li>• The Sacraments of the Church</li> <li>• Patrology and Biblico-Christian archaeology</li> <li>• Methods and materials of research: library</li> </ul>
<b>Second Year</b>	
<b>First Semester</b> <ul style="list-style-type: none"> <li>• Christology</li> <li>• Synoptic Gospels</li> <li>• Pastoral psychology and counseling</li> <li>• Church history II: 14th C. to present</li> <li>• Asian elective</li> </ul>	<b>Second Semester</b> <ul style="list-style-type: none"> <li>• Ecclesiology</li> <li>• Paul</li> <li>• Theological anthropology: Sin and Grace</li> <li>• Special moral theology I: medical/ sexual ethics</li> <li>• Philippine church history (for Filipinos)</li> <li>• Asian church history (international students)</li> <li>• Free elective</li> </ul>
<b>Third Year</b>	
<b>First Semester</b> <ul style="list-style-type: none"> <li>• Psalms and wisdom literature</li> <li>• Soteriology and Mariology</li> <li>• God, One and Triune</li> <li>• Sacraments and vocation</li> <li>• Special moral theology II: Christian Social ethics</li> <li>• Canon law I: Introduction, Books, I- II</li> </ul>	<b>Second Semester</b> <ul style="list-style-type: none"> <li>• John</li> <li>• Themes related to ecclesiology</li> <li>• Holy Eucharist</li> <li>• Cannon law II: Books III-IV except marriage</li> <li>• Practicum elective</li> </ul>
<b>Fourth Year</b>	
<b>First Semester</b> <ul style="list-style-type: none"> <li>• Cannon law III: Marriage, Books V-VII</li> <li>• Introduction to pastoral methods</li> <li>• STB comprehensive exam review</li> <li>• <i>Ad Audiendas Confessiones</i></li> <li>• Presiding at Liturgy</li> </ul>	<b>Second Semester</b> <ul style="list-style-type: none"> <li>• STB Comprehensive Exam</li> <li>• Ministry of the Word II</li> </ul>

## APPENDIX L

### Adult Learning Principles and Their Application in the Jesuit Formation

<b>Adult Learning Principles</b>	<b>Application to Jesuit Formation</b>
Adult learners have accumulated a wealth of life experiences and knowledge (Collins, 2004)	<p>Allow for an explicit connection of a seminarian’s past leadership background (i.e., working in a private corporation) to new information (i.e., serving in a high-needs school). Prior understanding of concepts and skills and their development through the course(s) can be assessed through journaling.</p> <p>Leadership learning should also be connected to a deepening appreciation of it as a Christian ministry that is part of their Jesuit vocation.</p>
Adult learners are autonomous and self-directed (Collins, 2004)	<p>Formators or professors at the School of Theology should avoid being the sole providers of information, but instead facilitate learning by involving the seminarians in the process (i.e., deepening discussions). The seminarians can also be given readings and simple projects as performative and evaluative tasks which they can accomplish on their own, at their own pace, and within their contexts (i.e., learning intercultural dialogue in schools through readings on “funds of knowledge,” and engaging in-depth interviews with IP parents and students)</p> <p>It is important to take note as well that skills that are applicable (i.e., financial and human resource management) in the mission schools can be learned at a period that is closer to the Jesuits’ missioning than earlier on in their seminary formation when they had little chance putting it into practice.</p>
Adult learners are goal-oriented (Collins, 2004)	<p>Leadership learning should be systematic: the course(s) must be developed with clear objectives and timeline. The seminarians must become aware of how their leadership course(s) are applicable to their context.</p>
Adult learners are interested in relevant and practical courses (Collins, 2004)	<p>Allow the seminarians to discover the relevance and practical use of their learning as related to their current apostolic engagements and their future assignments in the mission schools.</p>
Adult learners are experiential learners (Brown, 2006)	<p>Seminarians should be given as much exposures to the mission schools and the demands in these contexts as it would be possible. They can have educational plunges (Brown, 2006) during the summer of their last school year in the seminary and have a structured project that involves them collaborating with the Jesuits and their lay colleagues in the mission area/schools.</p>

*Note:* These are the basic principles of adult learning and their possible application to an educational leadership preparation plan in the Jesuit formation program in the Philippines.

## APPENDIX M

### Sample Educational Leadership Module

<b>Developing Intercultural Inclusivity, Appreciation, and Advocacy (sustainability)</b>			
	<u>Conscience:</u> <b>Critical Consciousness</b>	<u>Competence:</u> <b>Conceptual Knowledge</b>	<b>Compassionate Commitment: Practical Skills</b>
<b>Curriculum</b>  <i>Pre-requisite courses: Christian Social Ethics / Catholic Social Teachings and Pastoral Methods</i>	Providing content that raises student consciousness about power, privilege, and associated issues (i.e., clericalism and implicit biases)	Knowledge about related theories, subject areas such as Philippine Indigenous People’s (IP) history, IP rights and ancestral domains	How to engage in intercultural dialogue
<b>Pedagogy/Andragogy</b>	Employing teaching methods for raising student consciousness about power inequities through field immersions and conversations with tribal members and leaders as well as reflecting upon these exposure experiences in the light of Catholic social teachings	Readings on working with indigenous knowledge and critical pedagogy (i.e., works of Brazilian educator Paulo Freire) and Catholic Church documents such as Ecclesia in Oceania by St. Pope John Paul II	Allowing seminarians to do summer internships in mission schools and shadow current school directors; create a SWOT analysis of the IP programs of a mission high school
<b>Evaluation</b>	Assessing through reflection papers and presentations on how the seminarians have grown in their disposition towards a greater acceptance and appreciation of a culture other than their own.	Capstone performance tasks/projects such as organizing with IP leaders a mini symposium on how traditional knowledge from the IPs can be included and highlighted in mainstream school curriculum in mission areas.	

*Note:* This is an illustrative sample module that can be used in the Philippine Jesuit formation program to develop among future first-time mission high school leaders their awareness of, knowledge on, and skills at intercultural inclusivity, appreciation, and advocacy (sustainability) within the context of Southern Philippine Mission District (SPMD) mission schools.

## APPENDIX N

### JCAP Leadership Competencies Evaluation and Reflection Tool (Ateneo-CORD, 2015)

Developed by the Ateneo-CORD (2015) for the JCAP Leadership Program

Ateneo de Manila University’s Center for Organization and Research Development (CORD) has collaborated with the Jesuit Conference of Asia Pacific (JCAP) in running a two-year leadership workshop for Jesuits and lay colleagues in the Asia Pacific region.

Before the start of each workshop cycle, Ateneo-CORD would send out assessment survey forms to the participants as well as their supervisors, peers, and/or direct reports. They were instructed to evaluate the participant of the workshop based on the 16 leadership competencies (i.e., disposition/attitudes, knowledge, and skills) identified by Jesuit leadership and other mentors as important for current and potential leaders in the Jesuit ministries.

The following enumerates the 16 identified competencies and some their corresponding behavioral indicators for this evaluative and reflective tool developed by Ateneo-CORD (2015) for the Jesuit Conference of Asia Pacific (JCAP). Permission has been granted to reprint this tool as an appendix to the dissertation.

<u>Competency</u>	<u>Behavioral indicators</u>
Embracing and Leading Change	<ul style="list-style-type: none"> <li>• able to read the context in a dynamic situation or environment</li> <li>• able to adjust behavior, attitude or strategy to suit the situation</li> <li>• able to anticipate others' resistance to change and shepherd their acceptance of change</li> </ul>
Strategic Thinking	<ul style="list-style-type: none"> <li>• evaluate the internal and external environment and their impact on the ministry</li> <li>• facilitate the creation of the ministry's vision, mission and strategies</li> <li>• encourage support and alignment towards the fulfillment of the ministry's vision, mission and strategies</li> <li>• identify expertise and tap team members who can contribute to the achievement of the ministry's goals and directions</li> </ul>
Communication	<ul style="list-style-type: none"> <li>• listen and observe attentively to others' verbal and non-verbal communication</li> <li>• adapt content and delivery of message according to the purpose and the receiver</li> </ul>
Relationship Building	<ul style="list-style-type: none"> <li>• speak in a clear, concise, and organized manner</li> <li>• demonstrate <i>Cura Personalis</i></li> <li>• build rapport and make oneself available for coaching, mentoring, or consultation</li> <li>• give and receive feedback in a respectful manner</li> </ul>

<u>Competency</u>	<u>Behavioral indicators</u>
Collaboration	<ul style="list-style-type: none"> <li>• bring people together by demonstrating commitment to the ministry's goals and causes</li> <li>• build networks and partnerships that can help achieve the Society of Jesus' mission</li> <li>• recognize the differences among cultures, religions and genders and remain sensitive to these differences</li> <li>• engage in dialogue with members of different religions and sectors</li> </ul>
Conflict Management	<ul style="list-style-type: none"> <li>• recognize differences in perspectives and encourage open discussion</li> <li>• remain objective and caring whenever conflict arises, and focused on the goal at hand</li> <li>• anticipate and address potential conflicts before they escalate</li> </ul>
Project Management	<ul style="list-style-type: none"> <li>• deliver projects on time, within budget and at the required quality level</li> <li>• balance focus on project accomplishment with the well-being of team members</li> <li>• use Project Management methodology and tools</li> </ul>
Decision Making	<ul style="list-style-type: none"> <li>• understand the issues, problems, or opportunities at hand</li> <li>• compare data from different sources before drawing conclusions</li> <li>• take action that is consistent with available facts, constraints and probable consequences</li> <li>• constantly refer to the Society of Jesus' vision, mission, and values when making decisions</li> </ul>
Crisis Management	<ul style="list-style-type: none"> <li>• anticipate situations by creating contingency plans and solutions</li> <li>• establish monitoring systems and communication plans as part of crisis management preparedness</li> <li>• remain cool under pressure, gather data, make sound decisions and take decisive actions</li> </ul>
Public Relations Management	<ul style="list-style-type: none"> <li>• manage the dissemination of information from the ministry to the public</li> <li>• ensure that the ministry presents a unified public image aligned with its mission, vision and strategies</li> <li>• display knowledge and understanding of the various media platforms including social media</li> </ul>
Facilities Planning and Management	<ul style="list-style-type: none"> <li>• demonstrate knowledge of facilities management, technologies and systems</li> <li>• keep safety, sustainability and the ministry's long-term vision in mind when creating and implementing facilities management strategies</li> <li>• ensure compliance with Society of Jesus' protocols when planning for new structures and expansion</li> </ul>

<u>Competency</u>	<u>Behavioral indicators</u>
Financial Management	<ul style="list-style-type: none"> <li>• identify the ministry's resource requirements then develop and implement a fundraising strategy</li> <li>• develop, implement and monitor budgets and financial plans</li> <li>• ensure the reliability and integrity of financial information</li> </ul>
Human Resource Management	<ul style="list-style-type: none"> <li>• understand the basic human resource management functions</li> <li>• ensure that HRM programs and systems are just and equitable</li> <li>• ensure that HRM programs and systems attract, engage, and retain employees</li> <li>• understand labor laws and ensure collaborative relationships with labor unions/employee organizations (if applicable)</li> </ul>
Sustainability	<ul style="list-style-type: none"> <li>• install systems to ensure successors and a younger generation of leaders to continue the ministry's goals</li> <li>• create programs that facilitate continuous learning and retain and transfer knowledge</li> <li>• build a culture of care and responsibility for the environment and the ministry</li> </ul>
Self-management	<ul style="list-style-type: none"> <li>• strives to discover own strengths and weaknesses as a person and as a leader</li> <li>• prepare spiritually, physically, mentally and morally to carry on the mission</li> <li>• seek feedback and pursue continuous learning and growth</li> <li>• aware of one's emotions and able to adjust responses/reactions toward a healthier outcome</li> <li>• open to new ideas, methods and approaches</li> </ul>
Ignatian Spirituality	<ul style="list-style-type: none"> <li>• use St. Ignatius' spiritual exercises as a contemplative way of seeing</li> <li>• use discernment to understand and act on the signs of the times</li> <li>• demonstrate an incarnational spirituality, and believe that God can be found in everyday events in our lives</li> <li>• seek internal freedom from attachments</li> <li>• strive to be a person for others</li> <li>• live in solidarity with the poor and marginalized</li> </ul>

The first 14 competencies are rated using the rating scale below:

- 1- I have (He/she has) limited knowledge and experience in this
- 2- I (He/she) can do this with some guidance
- 3- I (He/she) can do this on my own
- 4- I (He/she) can guide other people in this



5- I (He/she) can consider myself an expert in this

While the competencies of Self-Management and Ignatian Spirituality were rated using the following rating scale:

1- Never 2- Rarely 3- Most of the time 4- All the time

The results are then tabulated to show the average score for each competency. The results are also presented to the individual participants for them to reflect on with the help of the following guide questions:

- What are my strengths and areas for improvement?
- What have others identified as my strengths and areas for improvement?
- What does this tell me about myself versus how others see me?

A sample summary of results (from an anonymous participant) is shown below which indicates a column of “Self-rating” for the participant’s averaged score for the 16 JCAP competencies. The columns “Others Rating” (e.g., Person 1, Person 2, and Person 3) reflect the average scores from each of the other evaluators (e.g., superior, peer, and direct reports) without them being identified specifically. The scores of these evaluators are averaged and recorded on the “Others Average Rating” column while all scores are averaged under the “Overall Average Rating” column. The “Description” column indicates the level of competency that the workshop-participant based on the over-all average rating.

**Sample JCAP Leadership Competency Report (from an anonymous participant)**

Competency	Self-rating	Other’s rating (person 1)	Other’s rating (person 2)	Other’s rating (person 3)	Others average rating	Over-all average rating	Description
Embracing and Leading Change	1	1	1	1	1	1	<i>The participant has limited knowledge and experience in this.</i>
Strategic Thinking	2	2	2	2	2	2	<i>The participant can do this with some guidance.</i>
Communication	3	3	3	3	3	3	<i>The participant can do this on his own.</i>
Relationship Building	4	4	4	4	4	4	<i>The participant can guide other people in this.</i>

### Sample JCAP Leadership Competency Report (from an anonymous participant)

Collaboration	5	5	5	5	5	5	<i>The participant can be considered an expert in this.</i>
Conflict Management	3	5	5	4	5	4	<i>The participant can guide other people in this.</i>
Project Management	3	3	3	3	3	3	<i>The participant can do this on his own.</i>
Decision Making	4	4	4	4	4	4	<i>The participant can guide other people in this.</i>
Crisis Management	5	5	5	5	5	5	<i>The participant can be considered an expert in this.</i>
Public Relations Management	3	5	5	4	5	4	<i>The participant can guide other people in this.</i>
Facilities Planning and Management	4	4	4	4	4	4	<i>The participant can guide other people in this.</i>
Financial Management	5	5	5	5	5	5	<i>The participant can be considered an expert in this.</i>
Sustainability	3	5	5	4	5	4	<i>The participant can guide other people in this.</i>
Self-Management	3	4	4	4	4	4	<i>Observed in the participant all the time.</i>
Ignatian Spirituality	4	4	3	3	3	3	<i>Observed in the participant most of the time.</i>

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