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The Continuation of a Rich Heritage: An Exploration of the Role of Founding Charisms in Lay Trust Bodies for Catholic Secondary Schools in the Republic of Ireland.

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I hereby certify that this material, which I now submit for assessment on the programme of study leading to the award of Doctor of Education, is entirely my own work, and that I have exercised reasonable care to ensure that the work is original, and does not to the best of my knowledge breach any law of copyright, and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of my work.

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Date: **12 April 2023**

Dedication

Dedicated to my parents, Denis and Mary Feehan, who instilled the gift of learning.

Mary Feehan 16/05/1945 – 14/02/2022

(*Requiescat in pace*)

It may be that the gulfs will wash us down;
It may be we shall touch the Happy Isles,
And see the great Achilles, whom we knew.
Tho' much is taken, much abides; and tho'
We are not now that strength which in old days
Moved earth and heaven, that which we are, we are,—
One equal temper of heroic hearts,
Made weak by time and fate, but strong in will
To strive, to seek, to find, and not to yield.

Extract from *Ulysses* by Alfred Lord Tennyson (1809–1902)

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Explanatory List of Abbreviations

AMCSS	Association of the Management for Catholic Secondary Schools
APTCS	Association of Patrons and Trustees of Catholic Schools
ASTI	The Association of Secondary Teachers in Ireland
ATCS	The Association of Trustees of Catholic Schools
CEIST	Catholic Education, An Irish Schools Trust
CEP	Catholic Education Partnership
CMRS	Conference of Major Religious Superiors
CORI	Conference of Religious of Ireland
CPSMA	Catholic Primary Schools Management Association
CSP	Catholic Schools Partnership
DCU	Dublin City University
DEA	Des Places Education Association
ERST	Edmund Rice Schools Trust
ETB	Education and Training Board
FIRE	Future Involvement of Religious in Education
IEC	Irish Episcopal Conference
JMB	Joint Managerial Body
LET	Loreto Education Trust
NEC	The National Education Convention (1994)
PBST	Presentation Brothers Schools Trust
PJP	Public Juridic Person. An entity linked to the Irish Episcopal Conference under canon law (Roman Catholic Church). Four Catholic education Trusts in Ireland are designated as PJPs: CEIST, ERST, Le Chéile and PBST
RSC	The Religious Sisters of Charity
SET	Spiritan Education Trust
SSS	Secretariat of Secondary Schools
TA	Thematic Analysis

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Abstract

The Continuation of a Rich Heritage: An Exploration of the Role of Founding Charisms in Lay Trust Bodies for Catholic Secondary Schools in the Republic of Ireland.

Brendan Feehan

This study investigates the role that founding charisms play in Catholic Trust bodies in the Republic of Ireland. The deficit of research in this arena over previous decades, as evidenced by the gaps in the literature, has prompted the current research. When the Irish State was founded in 1922, an educational administration system was already in place, reinforcing the denominational character of schooling. When religious congregations established schools, they did so with a particular mission and/or founding intention. As founders of schools, they had distinctive responsibilities that had a legal as well as a moral basis. Dating back to 1999, religious congregations established lay Trust bodies to manage their schools, owing to societal change, including a fall in vocations of religious personnel.

This qualitative case study, emerging from a constructivist-interpretive paradigm, seeks to explore the role of founding charisms from the perspective of the religious personnel and laity who were immersed in the establishment and operation of these lay Trusts. By employing semi-structured interviews and documentary analysis, this research aims to offer a voice to the participants. The Trust bodies examined in this research are charged with carrying out the Trust function of 66 per cent of Catholic voluntary secondary schools in the Republic of Ireland. All data were analysed using thematic analysis with the NVivo software package.

The interview participants' views on the current role and remit of Trusts add rich insight into the workings of Catholic Trust bodies for education. Findings indicate that the processes of discernment (rooted in Gospel values) entered into by some religious congregations were beneficial. The religious congregations discovered a commonality and a renewed focus on their role in Catholic education. The founding charisms of the religious congregations who set up the Catholic education Trusts are still germane. The relationship between Trusts and their schools has progressed, moving from a stance of suspicion and tension to one of confidence and hope in the future. This study has also shown that no consensus exists in relation to the emergence of a single Trust for Catholic schools in Ireland and the issue of funding Trusts will remain a challenge in the future.

Chapter 1: Introduction

This study explores the opinions of religious personnel and lay persons who are or were previously involved in the operations of Catholic Trust bodies for secondary (post-primary) schools in the Republic of Ireland (henceforth referred to as Ireland). The research explores the role of founding charisms in lay Trust bodies for Catholic Secondary Schools. The research question asks *What is the role of founding charisms in Catholic Trust bodies in Ireland?*

Trust bodies for Catholic secondary (post-primary) schools are a recent development in Ireland. Commencing in 1999, religious congregations established companies in law to take over the statutory duties of Trustees in accordance with the Education Act 1998. The Education Act refers to the role of the Patron. The term 'Trustee' or 'Trust(s)' in this research refers to the legal powers bestowed to the 'Patron' or 'Trustee' in accordance with the Education Act (see Madigan, 2011). Nine Trusts currently operate within the Catholic education sector in Ireland. Four of these Trusts are designated as a 'Public Juridic Person' (PJP). A PJP is an entity linked to the Irish Episcopal Conference under canon law.

1.1 Key Definitions
1.1.1. Trusteeship

The statutory framework for the governance of secondary schools in Ireland is the Education Act 1998. This 1998 Act places legal obligations on Trust bodies for the operation of their secondary schools. Section 8 of the Education Act (1998) focuses on the term 'Patron of school' and defines it as

> (a) 'the person who, at the commencement of this section, is recognised as the Patron of a primary school', and (b) 'the persons, who at the commencement of this section, stand appointed as Trustees or as board of governors of a post-primary school and, where there are no such Trustees or such board, the owner of that school'.

While the term 'Patron' has existed since the early years of the National Education System regarding primary schools and also for a considerable period of time concerning diocesan colleges, the term has not generally been used to designate the owners or Trustees of voluntary secondary schools founded by religious institutes or lay people (Madigan, 2011). Hence, the term 'Trustee' or 'Trust body' is more common at second level. School Trusteeship refers to the moral and legal responsibilities of those entrusted with the provision of education according to a particular ethos. All Trusts carry out the legal and inspirational roles as outlined in the Education Act and in their own charter documents (Reynolds, 2009).

The Code of Canon Law is also referenced in this thesis. Canon law is the legal system of the Catholic Church. The word 'canon' comes from the Greek 'kanon', meaning a rule or measure. Pope St Pius X in 1904 decided that canons should be collected and simplified into a single authoritative code. The Catholic Church's first Code of Canon Law was ready in 1917. The 2,414 canons were in force through the Second Vatican Council (1962–1965) henceforth referred to as Vatican II. A revision of the canon laws commenced in 1966. This process was completed in 1982. In January 1983, Pope St John Paul II promulgated the 1,752 canons of the new Code of Canon Law, which duly took effect; this is known as the 1983 Code (Peters, 1991).

1.1.2. Defining the Terms Charism and Ethos (Characteristic Spirit)

In the context of this research, the term 'charism' relates to the unique founding intentions that religious congregations bestowed to the schools they established in the past. How this unique heritage or gift is lived out in school life is referred to as the school's ethos or characteristic spirit. The dictionary defines charism as a free gift or favour specifically vouchsafed by God, being 'a grace or talent' (Lydon, 2009, p. 42). Keating (2005, p. 22) concludes that the educational mission of a school is informed

not just by the Gospels and by the Church but also by the charism of the founding congregation. Grace's definition of mission integrity – as 'fidelity in practice and not just in public rhetoric to the distinctive and authentic principles of a Catholic education' – is also helpful (2002, p. 137). Ethos and characteristic spirit are terms commonly used interchangeably within the literature (see Steele, 2018). For this research, 'ethos' and 'characteristic spirit' are defined as 'the atmosphere that emerges from the interaction of a number of aspects of school life, including teaching and learning, management and leadership, the use of images and symbols, rituals and practices, as well as goals and expectations' (Norman, 2003, p. 1).

1.1.3. Discernment

The term 'discernment' is utilised in this thesis and refers to a process of coming to a decision or conclusion about something. This decision or conclusion itself is not as important as the process by which the decision has been made (Tran, Boyd and Vennard, 2015, chap. 8). Expanding on this, Nouwen (2013) defines discernment as a spiritual practice designed to understand God's word and direction to God's people. This definition helps define the discernment processes of congregations specific to the complex challenges of the Church. The commonalities and differences in the discernment process can be instructive to those who engage in discernment processes for their respective congregations (Harris, Yancey and Steward, 2020).

1.1.4. A Common Ground, Gospel Values, and a Sacramental Perspective

For the purposes of this research project, the phrase 'common ground' refers to shared Gospel values that are seen to be given greater prominence than the individual charisms of the religious congregations. Tuohy (2005, p. 10) refers to the 'soul searching' engaged in most religious congregations and the search for a more authentic witness to Gospel values resulting in new theology and renewal. Shields (2018)

explains that Vatican II introduced a 'new narrative' for Catholic schools. Catholic schools were to share in the Church's evangelising mission by embodying an ideal learning community in a manner rooted in Gospel values. This results in Gospel values emerging in the experience of teaching as a humanly liberating activity and not merely 'exported from the Bible' (Shields, 2018, p. 84). Stock (2012, p. 15) contends that the use of the term 'values' in relation to the content and message of the Gospel is relatively modern. Moreover, Stock writes that the term 'Gospel values' is 'commonly used in Catholic schools and other Catholic institutions', however according to Stock; 'unless the term is unpacked and a common understanding formed of what true Gospel values are, there is a danger that what should be an objective Christian foundation, will itself become a random list of subjective values' (Stock, 2012, p. 15). Stock helpfully links the term Gospel values with the Beatitudes (p. 16). Stock then articulates the perennial nature of virtues especially the theological virtues of faith, hope and love. Lydon (2011, p. 137) explores the concept of a 'sacramental perspective' which according to Lydon is linked with the universal call to holiness and 'in order to be "called to the fullness of Christian life", the individual Christian must make a firm commitment to the radical call to discipleship received in baptism'. Lydon states that in the context of the Catholic school 'the sacramental perspective is a dominant paradigm within the theological framework of the Second Vatican Council' (Lydon, 2011, p. 137). The theme of the sacramental perspective is discussed further in chapter two.

1.2. The History and Structure of the Secondary School System in Ireland
1.2.1. Moving from the 'Deep Roots' to Modernity

The earliest attempt at State educational provision in Ireland originated in the English Order, Habit and Language Act (1537), passed by the Dublin Parliament. This Act

established parochial or parish schools so that the 'English tongue, habit and order be henceforth used by all men' (Clarke, 2010; Mathúna, 2016). The local Anglican bishop licensed these schools. Catholics set up an alternative network called 'hedge schools'; this denotes the start of Catholic education in Ireland (Looney, 2003; Tuohy, 2013a). Hedge schools were informal and 'often illegal' schools in Ireland in the eighteenth and early nineteenth century, attended by 'relatively poor students' (O'Higgins, 2017, p. 1). It was not until the Relief Act of 1782, which permitted 'persons professing a Popish religion to teach school' (Randles, 1975, p. 18), that Catholics were allowed to teach and conduct schools without 'fear of prosecution' (Feheney, 1998, p. 5). By this statutory provision, the first royal or diocesan schools were free and were attended mainly by Protestants. A small number of Catholic schools were founded in the earlier part of the eighteenth century. The Stanley Letter of 1831 was a seminal event in Irish education (Coolahan, 2006; Tuohy, 2013a). Written by Edward Stanley, the Chief Secretary for Ireland (a cabinet position in the British government), it approved the establishment of the Commissioners for National Education to promote a state-sponsored system of primary education in Ireland. Together, the Stanley Letter and the Relief Act of 1892 paved the way for Catholic orders to establish and operate schools in accordance with their founding intentions (O'Connor, 1986). These early legislative events are significant, as they influenced how the Catholic Church was to contribute to the education system in the centuries that followed (Randles, 1975; Feheney, 1998). Coolahan (2006, pp. 90–91) describes the State's approach to Catholic education prior to the nineteenth century as 'hostile', characterised by a 'system of penal legislation'. Under British rule, the authorities in the Catholic Church and the Presbyterian Church had begun to assert themselves concerning primary education. Ultimately, they achieved what they wanted – a denominational system

funded to an increasing extent by government (Doyle, 2000). The church authorities encouraged the establishment by religious orders and congregations of schools providing secondary education at minimum cost to parents (Randles, 1975; O'Connor, 1986; Doyle, 2000; Coolahan, 2006; Cunningham, 2009; Tuohy, 2013b).

Coolahan (2006) recognises the importance of the Catholic Church's reaction to State initiatives, because it sought (a) single-sex schools and (b) denominational schools. In the 1920s, as the Irish State came into being, a system of educational administration was already in place, reinforcing the denominational character of schooling. Tuohy (2013a) notes that, with independence, the new Irish government inherited a ready-made infrastructure for education, supported and managed by the churches.

Doyle (2000) and Williams (2005) concur that the Catholic Church found itself with a government that was sympathetic to its educational project. When the Irish Department of Education was established in 1924, the Catholic Church had long experience in knowing what they wanted in a national school system. The new State did not attempt to interfere with the denominational nature of the primary schools or with the powers of the local manager, usually a priest or clergyman. The primary and secondary schools were the most important resources controlled by the Catholic Church. Lack of agreement on the management of schools resulted in the system being organised on denominational lines (Clancy, 1995; Nic Ghiolla Phádraig, 1995).

By the 1960s, the Church was long accustomed to non-interference by the State, and the scene was set for the decades that followed. The introduction of free education in September 1967 'is now widely seen as a milestone in Irish history' (O'Brien, 2019).

In his analysis of the developments in Irish education during the second half of the twentieth century, Walsh (2016) comments that the 'educational policy of the Irish

State was transformed between the late 1950s and the mid-1970s' (p. 259), reflecting the political and cultural changes in Irish society. The relationship between Church and State is an important theme in the literature. Observers describe this relationship as both symbiotic and sympathetic (McNamara and Norman, 2010; Walsh, 2011) – and as one that was mutually beneficial. It shaped the current education system, as evidenced today. The State appeared to be content to cede the control and management of schools to the Church (McNamara and Norman, 2010). The introduction of free education in 1967, in conjunction with Vatican II (discussed in the next section), is described as a defining event impacting the involvement of Catholic orders in Irish education (OECD, 1965; Lane, 2015). It is generally accepted that societal changes and Vatican II impacted the lives of the religious involved in Irish schools.

Prior to the processes of discernment (unpacked later in this research), the religious orders feared the possible loss of their ownership and management in the schools 'integral to their religious lives' (Collins, 2012, p. 116), where an educational and spiritual life's work had been wholeheartedly invested.

It is interesting to note that there was a different dynamic at work within diocesan-owned primary schools and the congregational-owned secondary schools. This was a result of the difference in relationships between religious congregations and local Church members, with the identity of religious congregations more closely connected with the inspiration of a founder rather than a particular place such as a parish (Tuohy, 2013a).

1.2.2. The Structure of the Secondary School System in Ireland

The structure of secondary education in Ireland can be described as having three sectors: voluntary secondary schools, community or comprehensive schools, and community or vocational colleges (Darmody and Smyth, 2013, p. vii). Voluntary

secondary schools are mostly denominational schools under the Trusteeship of a religious order, lay Trust or diocese. A non-denominational Patron, Educate Together, opened its first secondary school in 2014. Educate Together secondary schools are classified as voluntary secondary schools. The local Education and Training Board (ETB) owns vocational schools and community colleges. Community and comprehensive schools were established in the 1960s to provide a more practical curriculum. Many community schools were established as a result of the amalgamation of voluntary secondary and vocational schools (*Choosing a Post-Primary School*, 2019).

The percentage of secondary schools in Ireland designated as having a Catholic ethos by the Department of Education has decreased slightly in the past ten years.

Year	No. of secondary schools in Ireland	No. of secondary schools with a Catholic ethos	% of secondary schools in Ireland designated as having a Catholic ethos
2021	728	344	47
2016	711	344	48
2011	722	352	49

Table 1 Number of Secondary Schools in Ireland 2011, 2016 & 2021

(Post-Primary Schools, 2022)

Not all secondary schools designated as having a Catholic ethos are voluntary secondary schools.

1.2.3. Trusts for Catholic Schools

Catholic Trust bodies are a recent phenomenon within the Irish education system (McCormack, 2000; Reynolds, 2006; Madigan, 2011; Collins, 2012; Woulfe, 2012; Griffin, 2018). The first Trust for Catholic schools in Ireland was the Des Places Education Association (now the Spiritan Education Trust), established in 1999 by the Spiritans (the Congregation of the Holy Spirit). Trust bodies were established by

religious orders to govern the schools that were previously managed by the religious themselves. The religious orders being examined developed 'deep roots' within this education system (Randles, 1975, p. 18). All sectors in the Irish education system have undergone significant changes since the foundation of the State. These changes have been 'particularly pronounced in denominational voluntary secondary schools' (Darmody and Smyth, 2013, p. vii). The move from school governance by religious orders directly to governance by Trust bodies was necessary because of declining vocations to religious life (Andrews, 1997; Darmody and Smyth, 2013), a changing legislative backdrop, and greater secularisation in Irish society (Darmody and Smyth, 2013). Education Trusts are civil companies created by religious orders to maintain their work into the future (APTCS, 2022). In recent years, there has been a restructuring of organisations and bodies that represent Trust bodies and the Catholic school sector in Ireland.

1.2.4. Structures within Irish Catholic Education

In August 2020, the Catholic Education Partnership (CEP) was established. The CEP replaced the Catholic Schools Partnership (CSP). The role of the CEP is described as 'an advocacy role for primary, post-primary, third level and adult Catholic Education in Ireland and aims to provide an authoritative and unified voice for Catholic education in the public forum' (Griffin, 2022).

The Association of Patrons and Trustees of Catholic Schools (APTCS) was registered as a company in July 2020. The APTCS replaces the Association of Trustees of Catholic Schools (ATCS). Its 'parent body' the CEP represents the agreed position of Catholic post-primary Patrons, Trustees, and management nationally with the State and other relevant education bodies.

The APTCS consists of the following:

	Number of schools	% of schools within APTCS
9 Trusts	261 schools	77%
20 dioceses	40 schools	12%
14 congregations	21 schools	6%
Lay schools	18 schools	5%

Table 2 Membership of APTCS

(APTCS, 2022)

Trusts are structured as single-order Trusts or as multi-order Trusts. Single-order Trusts were set up by religious congregations that did not join with other congregations to establish the Trust. Multi-order Trusts were established by several congregations that joined together. The nine Trusts for Catholic education are:

Trust	Year established	No. of religious orders in Trust (2022)	Religious order(s)
Des Places Education Association (now the Spiritan Education Trust: SET)	1999	1	The Spiritans (the Congregation of the Holy Spirit/Holy Ghosts)
Loreto Education Trust (LET)	2003	1	The Loreto Congregation (the Institute of the Blessed Virgin Mary)
Mount Anville Sacred Heart Education Trust	2007	1	The Society of the Sacred Heart of Jesus
Catholic Education, An Irish Schools Trust (CEIST)	2007	5	Daughters of Charity, Presentation Sisters, Sisters of the Christian Retreat, Sisters of Mercy, Missionaries of the Sacred Heart
The Le Chéile Schools Trust	2008	15	The Sisters of the Cross and Passion, Patrician Brothers, Poor Servants of the Mother of God, Dominican Sisters, De La Salle Brothers, Sisters of Christian Education, Holy Faith Sisters, Sisters of Jesus and Mary, Faithful Companions of Jesus, Sisters of St Louis, Sisters of St Paul, Society of the Holy Child Jesus, St Joseph of Cluny, Ursuline Sisters and Marianists
The Edmund Rice Schools Trust (ERST)	2008	1	The Congregation of Christian Brothers

Presentation Brothers Schools Trust (PBST)	2009	1	The Presentation Brothers
The Religious Sisters of Charity*		1	The Religious Sisters of Charity (RSC)
Jesuit Education*		1	The Jesuits (the Society of Jesus)

Table 3 Trust Structures for Catholic Education in Ireland

 (* Not formally a Trust structure. The APTCS designates as a Trust for operational reasons.)

This research project consists of semi-structured interviews and document analysis relating to four Trust bodies. These four Trust bodies have responsibility for 66 per cent of Catholic secondary schools in Ireland. This research project involved interviewing participants (religious personnel and laity) from two multi-order Trusts and two single-order Trusts.

1.3. The Scope of the Research

Throughout this research project, it emerged that a research lacuna existed regarding the study of Catholic Trusts within the Irish secondary education system. The research focused on the role played by founding charisms in four Trust bodies responsible for Catholic voluntary secondary schools. This study aims to give voice to the research gap identified.

1.3.1. The Research Question

The researcher has identified a research lacuna. The research question asks *What is the role of founding charisms in Catholic Trust bodies in Ireland?* This will be the subject of the research.

1.3.2. The Researcher's Reflectivity and Professional Background

McNiff and Whitehead (2009) encourage the researcher to spend time reflecting on his or her core values. Mortari (2015) expands on this by emphasising that reflection is a very important mental activity, both in private and professional life. Thus, the

practice of reflection is fundamental because it allows the researcher to engage in a thoughtful relationship with the world-life and thus 'gain an awake stance about one's lived experience' (Mortari, 2015, p. 1).

For this researcher, the lived experience is a background as a secondary school teacher, board of management member, and the principal/president of an all-boys seven-day boarding school. Furthermore, the researcher has led immersion projects to Catholic secondary schools in Ghana. This experience has led the researcher to reflect upon the role that the founding charisms of religious orders play in the life of Catholic secondary schools.

Chapter three outlines how the researcher's epistemological worldview is derived from an interpretivist foundation. Contextual constructivism best represents the philosophical assumptions that inform this research. These terms will be further unpacked in the methodology chapter. In the context of this research project, objective truth is accessed through documents and semi-structured interviews. The research design allows such human experience, thought and language to be accessed and acknowledged where the participants' unique experience and insight forms part of the research data.

1.3.3. Existing Research

One may suggest that there is a dearth of recent relevant research pertaining to the role of founding charisms in lay Trust bodies for Catholic secondary schools in Ireland.

Research conducted by Gleeson and O'Flaherty in 2016 compares Catholic schools in Ireland and Australia. The researchers find that Trusteeship arrangements for Catholic schools in the two countries differ. Trusteeship for Australian schools focuses on founding charism and does not involve 'any diminution of institutional charism'

(Gleeson and O'Flaherty, 2016, p. 49). The researchers conclude that the focus of the Irish Trust bodies is on Gospel values rather than founding charism.

However, according to Darmody and Smyth (2013), the background, origins, and charters of various religious orders shaped the ethos of voluntary secondary schools over and above an overall Catholic ethos. Collins (2012) concurs that there is a clear relationship between the congregations' core founding values and those values outlined in the Le Chéile Charter. Collins argues that '[t]he trust has inherited both sets of values and is responsible for them' (p. 324). Furthermore, Collins concludes that the Trust also knows the unique value(s) that each congregation bring(s), and which is/are offered within the Trust's heritage. A further outcome of the research recognises the importance of the lay vocation in the Church's mission.

Darmody and Smyth (2013) conclude that Trust bodies '[are] seen as having a significant input into shaping the ethos of the school, religious education and training for members of the board of management' (p. 151). This seminal study highlights the importance of Trusts and the ethos within their schools. Research conducted by Skelly (2012) concludes that principals of post-primary schools play a pivotal role in school ethos. This research finds that school leaders in Catholic schools were acutely aware that they were accountable to the Patrons for ensuring that the ethos was operative.

A 2021 study conducted on behalf of the Catholic Primary Schools Management Association (CPSMA), the CEP, and the AMCSS concludes that there is a new interpretation of 'Catholic' for Irish people, one concerned with the development of a moral compass, preserving an awareness of social justice, promoting social inclusion, and nurturing care for self and others (Genesis, 2021). The researchers conclude that this new interpretation is both desired by and relevant to parents. They identify clear

advantages that a Catholic ethos can bring to a school, and these are described as 'foundational' and 'developmental' in terms of morality and ethics. However, the research also questions whether Catholic schools would become either more universalistic and potentially 'Christian generic' or more Catholic 'specific', emphasising Catholic practices. What is described in the research as the 'best day' for the Church and Catholicism is represented by a focus point of hope, community, care, charity, respect, and ultimately a sense of greater purpose that builds resilience and leads to a more fulfilling life.

Byrne and Devine (2018), in a study of Catholic secondary schools, presented a typology of Catholic schooling in transition. They concluded that what has emerged in Irish Catholic schools is a more overt competitive ethos among schools as a result of the media publication of school league tables, together with lower state funding for fee-paying schools that has led to increased competition for students among fee-paying schools.

In 2011, the CSP analysed parental understandings of school Patronage. It concludes that school governance structures such as Patronage and boards of management are not widely understood. This research concurs with a conclusion from Darmody and Smyth (2013), who found that principals in voluntary secondary schools describe boards of management as having control over property and finance, 'whereas these areas are entirely the domain of the Trustees' (p. 151). Furthermore, the CSP reports that most parents make little connection between the daily running of the school and the relationship between boards of management, Trustees, and the Department of Education (Drumm, 2011).

1.3.4. Structure of Thesis

This chapter presents key definitions pertinent to this research project. The researcher outlines the structure of the Irish education system and discusses the historical context of Catholic education in Ireland. Furthermore, the scope and aims of this research is considered. Existing research relevant to the research question is explored.

Chapter two will discuss the existing literature within the scope of the research question. This chapter assesses the terrain on which the research question is based. The topics discussed in this chapter are Vatican II, the legal and moral obligation of religious orders to provide Catholic schooling, the development of Trust bodies within Irish Catholic schooling, and the place of Catholic schools within the Irish State. It includes an exploration of the understandings of charism and school ethos.

Chapter three outlines the methodological approach undertaken for this research. It explores the ontological and epistemological stances of the researcher, and describes and explains the case study approach in the context of this research project. It clarifies the sampling process and identifies approaches for document analysis and thematic analysis (TA). The chapter concludes with a presentation of the ethical considerations, limitations of the research, and the researcher's role.

Chapter four presents the findings of the research. This chapter outlines the nine findings produced during the thematic analysis stages of the data analysis. These findings are outlined under their own headings. Here, the researcher gives voice to the interview participants.

Chapter five discusses the findings outlined in chapter four and analyses the implications and significance of the research within the context of Catholic education in Ireland.

Chapter six details the conclusions that emerged from the research. It synthesises the implications of the findings and discussion chapters. Furthermore, it makes recommendations on where future research may be conducted.

Chapter 2: Literature Review

2.1. Introduction

The literature review establishes the context in which this research project was based. It commences by presenting an overview of the Second Vatican Council (Vatican II) and the Education Act 1998. It explores the development of Trusts for Catholic schools in Ireland, and the term 'charism' will be considered. The chapter concludes by discussing contemporary understandings of Catholic schooling and ethos.

2.2. Vatican II

The Second Vatican Council (Vatican II) took place between 1962 and 1965. The education document that emanated from Vatican II in 1965 was titled *Gravissimum Educationis* (Declaration on Christian Education). This document asserts the school's special importance as an 'educational instrument' and states that the school is designed to hand on the cultural legacy of previous generations (Vatican, 1965a, sec. 5). It is accepted that the period immediately following Vatican II was a period of confusion in the wake of doubts cast on the institutional certainties of the past (Doyle, 2000). Lane (2004, p. 68) observes that '[i]f one examines the documents prepared for the Council with the documents promulgated by the Council one will discover what can only be described as dramatic shifts in style and substance, in language and method.'

2.2.1. Vatican II and Laity

Vatican II affected how religious orders questioned their existence in education. This resulted in further involvement of the laity in the Church (Doyle, 2000; Tuohy, 2013b). Vatican II heralded a new spirit of dialogue and openness. Lane (1991, p. 55) refers to this new approach as being 'open and attentive to the voices of others'. There is a consensus that Vatican II caused a cultural and religious transformation in Ireland and brought a new openness between the Church and the modern world. Vatican II

recognised that the Church had much to contribute to and learn from the world (Grace, 2002; Keating, 2005). It was a key moment of transition and 'sought to give expression, in documentary and other forms' (Chambers, 2012, p. 186) to the ways the Catholic Church might express itself in the modern world. Chambers (2012) says the pronouncements of Vatican II on education reflected a more comprehensive view of the Catholic Church, a Church that comprises all members, both lay and clerical. The view prior to this tended to see the 'Church' as represented by the clergy (Coolahan, 1989, p. 55), reflected in the number of religious personnel who were school principals immediately post Vatican II (Cunningham, 2009).

According to McCormack (2000), there was no solid basis for believing that the continuation of Catholic education depended on the direct involvement of religious personnel. Consequently, Vatican II opened the door for the laity to be involved in the management and leadership of Catholic schools. However, both Collins (2012) and Woulfe (2012) question how a congregation would sustain their founding charisms when a value system shared among religious personnel was no longer present. As a response to this point, the Vatican document *A Shared Mission Between Consecrated Persons and the Lay Faithful* (2007) states that the implementation of a real educational community, built on the foundation of shared projected values, represents a serious task that the Catholic school must carry out (Vatican, 2007, sec. 5).

Documents since Vatican II make clear reference to the involvement of the laity within Catholic schooling. The 1982 document *Lay Catholics in Schools: Witnesses to Faith* contends that 'it is the lay teachers, and indeed lay persons, believers or not, who will substantially determine whether or not a school realizes its aims and accomplishes its objectives' (Vatican, 1982, sec. 1). The 'alarming decrease in numbers', referring to the declining involvement of religious personnel in schools, is again referenced in

Vatican statements (Vatican, 1988, sec. 13). Vatican II led to increased dialogue within religious orders (Kenny, 2004; Woulfe, 2012).

2.2.2. Vatican II and Religious Orders

The Vatican II document *Perfectae Caritatis* (Decree on the Adaptation and Renewal of Religious Life) called on religious orders to return to their original charisms (Vatican, 1965d). It queried the wisdom of some religious who, by Vatican II, were opting out of mainstream education in favour of less structured apostolic work (Doyle, 2000, p. 19). Murray states that the bishops of the Second Vatican Council 'desired to rekindle the spirit of the early Christian community by calling all the faithful to recognize and respond to the gifts of the Spirit within them' (2002, p. 132). In what Murray refers to as 'its critical second chapter', it 'spoke of the charisms given by the Spirit for the renewal and building of the Church'.

An insight into declining vocations and the impact on Catholic schools in Ireland was evident in May 1972. The Episcopal Commission on post-primary education and the Education Commission of the Conference of Major Religious Superiors (CMRS) set up a working party to examine the Future Involvement of Religious in Education (FIRE). This event is explored by Doyle (2000). Fr Paul Andrews, then headmaster of Gonzaga College (Dublin), chaired the FIRE working party. Andrews (1997) reflected that the context of the FIRE recommendations was to give religious time for their primary vocation, *vacare Deo* (to have time for God). Andrews (1997) rightly referred to Vatican II, pointing religious back to the roots of their vocation, and wrote that many members of religious orders felt that education could indeed be managed better by lay colleagues.

The involvement of religious personnel in Irish education is characterised robustly by Hogan (1997, p. 5), who describes the 'predominance of religious influences at all

levels'. McCormack observes that until the 1990s religious congregations regarded the exercising of their Trusts in relation to influencing school ethos as a straightforward matter. After all, management and a large proportion of staff were members of the congregation. However, McCormack (2000) asserts that even if congregations were not experiencing a decline in membership, there would be several arguments for considering new structures (McCormack, 2000).

2.2.3. Vatican II and Catholic Schools

Several notable themes emerge from the literature regarding Vatican II's impact on Catholic schools in Ireland. A key aspect was the role to be played by the laity, not only within the Catholic Church but also within Catholic schools. To this end, *Gravissimum Educationis* states: 'But let teachers recognize that the Catholic school depends upon them almost entirely for the accomplishment of its goals and programs' (Vatican, 1965a, sec. 8).

Woulfe (2012) posits that the impact of Vatican II on societal change in Ireland primarily meant that the self-understanding and role of the Catholic school changed dramatically. As Doyle (2000) notes, Vatican II brought among the owners of most voluntary secondary schools in Ireland 'a sense of excitement, expectancy, anticipation, fear of impending change and some cynicism' about its impact (p. 18). Indeed, this provides more evidence that change was happening. The declining vocations within religious orders had a lasting impact on the Church's capacity to manage Catholic schools on a day-to-day basis (Hogan, 1997; Cunningham, 2009). Chambers' (2012, p. 188) description of education being a minor theme at the Council obscured behind the 'twin pillars' of *Lumen Gentium* (1964) and *Gaudium et Spes* (1965c), both promulgated by Pope Paul VI, is indeed telling. Lydon (2011, p. 137) asserts that the sacramental perspective 'in the context of the Catholic school' is a

'dominant paradigm within the theological framework of the Second Vatican Council'.

2.3. A Sacramental Perspective

Lydon (2011, p. 137) cogently outlines the concept of a sacramental perspective when he states that it is 'linked with the universal call to holiness' in that, in order to be 'called to the fullness of Christian life', the individual Christian must make a firm commitment to the radical call to discipleship received in baptism. Moreover, according to Lydon (2011, p. 137) by engaging in the ministry of teaching, 'the individual Christian is responding to his or her primary call to be a disciple of Jesus in a distinctive manner, reflecting the notion of charisms being a concrete realisation of the universal gift of God through Christ to all the baptised'. Furthermore, this fundamental calling, according to Lydon (2011, p. 137) requires that 'all teachers model their ministry on that of Christ' and teachers are 'in effect, signs of the presence of Christ within their educational community'. 'The teacher who takes what is, in essence, the sacramental perspective seriously will be able to model discipleship' (Lydon, 2011, p. 143).

2.4. The Legislative Journey: The Education Act 1998

The literature review now turns to the influence that legislation has on the role of education Trust bodies. The Education Act (1998) is highly significant regarding the legislative framework for education Trust bodies. Authors such as Glendenning (2008), Kelleher (2012), and Woulfe (2012) concur that for the first time in the history of the State, a statutory framework for education existed, setting out the broad objectives and principles underpinning the education system. Prior to the 1998 Act, voluntary secondary schools were governed by departmental regulation and ministerial order. Colton (2009, p. 257) refers to this as 'a jigsaw of sources' resulting

in 'a melting pot of inaccessibility and incomprehensibility to all but the most assiduous and persevering analyst'. Of particular note to Trust bodies for education is the fact that Catholic schools now had to operate within a statutory context (O'Connell, 2015) and were obliged to promote students' moral, spiritual, social, and personal development. Of further significance to Trust bodies is that the 1998 Education Act compelled a school's board of management to be accountable to the Trustee to uphold the school's ethos. Section 15 (2) (b) of the Education Act 1998 states that a board of management shall perform 'the functions conferred on it and on a school by this Act and in carrying out its functions the board shall uphold, and be accountable to the Patron for so upholding, the characteristic spirit of the school'. *A Manual for Boards of Management of Voluntary Secondary Schools* (JMB, 2021, p. 92) – the handbook for the operations of schools' boards of management, agreed upon between the Secretariat of Secondary Schools (JMB/AMCSS) and the ASTI (the Association of Secondary Teachers in Ireland) – states that schools 'shall be conducted in accordance with the religious and educational philosophy of the aforesaid Institute as contained in the second schedule hereto'. Trustees define the characteristic spirit of their school in a document referred to as the 'Second Schedule'. The school property and grounds to be managed by the board of management are defined in the 'First Schedule'.

The Education Act 1998 resulted in education Trusts having a statutory basis integrated within the school enterprise. In particular, the role of Trustees in upholding a school's ethos was dealt with in the Act. The responsibilities and authority of a board for oversight, delegation, and support are discussed by Colton (2009, p. 258), who observes that, for the religious Trustee of a school, the educational enterprise occurs at the confluence of canon law on the one hand and the civil law on the other.

The Education Act 1998, together with Bunreacht na hÉireann/The Irish Constitution (1937) means that the Irish constitutional and legal position is highly favourable to Catholic schools. McGrady (2006, p. 145) considers this position to be 'probably the most favourable in Europe'. Colton (2009) adds that as well as fulfilling a pastoral role of support and guidance, Trustees fulfil a powerful and formative role and ought to be mindful of that power and indeed of their stewardship of it.

It is noteworthy that the Green and White Papers produced by the Irish legislative system between 1980 – the *White Paper on Educational Development* (Government of Ireland, 1980); the *Green Paper on Education: Education for a Changing World* (Government of Ireland, 1992); the *White Paper on Education: Charting our Education Future* (Government of Ireland, 1995) – and ultimately the passing of the Education Act 1998 did not at all times prioritise the role of Catholic school Patrons. The 1992 Green Paper omitted any reference to 'ethos' or 'characteristic spirit'. It evoked an enthusiastic response from the school authorities, mainly because it challenged the role and composition of boards of management and caused concern to Trustees because of what was perceived to be a poor understanding of the Trustees' role in school management (Doyle, 2000; Madigan, 2011).

A National Education Convention (NEC) took place from 11 to 21 October 1993, bringing together 42 educational bodies, social partners (see Regan, 2012), and the Department of Education. Social partnership in the Irish context was comprised of public bodies and organisations such as trade unions. Social partners engaged in a process based on a partnership model to advance economic and social development in Ireland. The Report on the National Education Convention (Coolahan, 1994, p. 151) acknowledges that the rights and roles of Patrons, Trustees, and owners of schools were under-emphasised in the Green Paper and associated documentation. The White

Paper of 1995 appears to have alleviated some of the previous concerns. However, the Report on the NEC did garner discourse around the dearth of mentions of religion in the final report, despite its being much more central during the convention's deliberations (Hogan, 1997; Doyle, 2000). The White Paper (Government of Ireland, 1995, p. 11) refers to school ethos in addition to referring to Patrons/Trustees/Owners/Governors (p. 144).

The right of the school Patron to define the characteristic spirit and to appoint boards of management to run their schools according to that spirit is further outlined by Griffin (2019). Griffin contends that the 1998 Education Act came into being at a time when religious orders were considering their role within the enterprise of education. This inevitably resulted in questions about who would manage Catholic schools in an ever-changing secular society. Importantly, congregations have been committed to preserving Catholic education as a strong, viable option. They have been seeking ways of handing over the enterprise of Catholic education as a vibrant and desirable concern (Tuohy, 2007; Colton, 2009).

2.5. School Trusteeship

The term 'Trustee' is of relatively recent origin and interest and seems to have only begun to achieve currency in the 1970s (McCormack, 1998). Whilst religious congregations have always exercised trusteeship in relation to the schools with which they are associated; the term 'Trustee' was rarely used in the context of schools before 1970 (Reynolds, 2006; Woulfe, 2012). It appears that the term 'Trustee' gained prominence in the 1990s when the various religious orders gave serious consideration to the establishment of Trust bodies (CORI, 1997) owing to declining vocations and external stimuli, such as the Education Act 1998. Whilst the changes required might have been evident in the 1980s, there appears to have been little enthusiasm to discuss

the changes in structure, governance, and legacy (Doyle, 2000). Griffin (2018) observes that, because of societal and economic issues during the 1980s, Catholic education providers began to question their specific role and unique identity. Issues such as a decline in vocations, changes in religious life, legislative developments, the growing influence of Vatican II, and a change in public perception of the religious personnel contributed to this questioning. Reynolds (2006, p. 49) writes that 'each congregation brings the richness of its original charism' as well as the 'firm legal basis for Trustee role'.

2.5.1. A Legal and Moral Dimension

The complexity of establishing a Trust is underlined by McCormack (1998), who cogently describes Trusteeship as having a legal and a moral basis. The legal basis arises from the fact that the congregation is the owner of the school in two senses: tangible property and the enterprise or mission. As the legal owner, therefore, the congregation holds the school in 'Trust' for the purposes of the 'mission'. The moral basis emerges from the premise that the role of the Trust is to ensure that the school ethos is consistent with the founding intentions of the respective order. This area is much discussed with little divergence (see McCormack, 1998; Darmody and Smyth, 2013; Griffin, 2018).

Still on this theme, the term Juridic Person within canon law comes to the fore. Trusteeship of property for the order's mission comes from Canon 115 of canon law (Codex Juris Canonici, 1917; Griffin, 2018). In establishing Trust bodies, orders had to be cognisant of both their legal (State law and canon law) and moral obligations. The focus on Trusts' legal obligations was evident in a document issued by CORI (Conference of Religious of Ireland) called *Religious Congregations in Irish Education: A Role for the Future?* (CORI, 2001). One might suggest that this

document seems to have focused more on the legal and governance dimensions as opposed to ethos, founding intentions, and lay involvement (Tuohy, 2001). The focus on various definitions and legal dimensions that shape one's understanding of Trusts is inevitable and necessary. Colton (2009, p. 256) describes 'the legal and logistical quagmires of ownership of the lands on which schools are built, together with a multiplicity of leases and Trusts'. However, it can also be more desirable to look upon Trusts less legalistically, according to Meany (2010).

2.5.2. The Development of Catholic Trusts in Ireland

The formation of Trusts came about as a result of the religious orders being informed and changed in a paradigm that included a new understanding of charism, heritage, canon law, and the legal implications of the 1998 Education Act regarding Patronage and Trusteeship. Evidently, by the mid 1990s questions posed to the religious 'weighed heavily on the religious congregations involved in planning for the future' (Collins, 2012, p. 119).

School Trusteeship refers to the moral and legal responsibilities of those entrusted with providing education according to a particular ethos. All these Trusts carry out the legal and inspirational roles outlined in the Education Act and their own charter documents (Reynolds, 2009). The handing over of Trusteeship was not an easy task, involving legal frameworks, financial support, and training (Griffin, 2018). After all, where the responsibility to safeguard a founding intention once rested with the religious within the sector, it would now be the laity's responsibility to nourish this ethos. A CORI assembly in 1994 was assured that any departure from the school's founding philosophy and distinctive values would result in the need for intervention (Reynolds, 2006).

2.5.3. A Model of Trusteeship

We turn now to the model of Trusteeship deliberated by religious orders. Sr Mary Reynolds (2006) observes that religious congregations did not envisage the handing over of the Trusteeship of schools as a 'closing down' but rather as the passing on of something they pioneered and developed. This is a view shared by Sr Canice Hanrahan (Oliver and Flynn, 2000). Griffin (2018, p. 69) outlines the various models of Trusteeship available to Catholic Education. These options are described as:

- the (virtual) *'Absentee Landlord'* model: best exemplified by the approach in State community schools and minimalist in nature.

- the *'Abdicators'*, where all responsibility is delegated to either the principal or the board of management.

- the *'Reactive'* model of Patronage and Trusteeship, for too long the predominant model according to Griffin.

- the *'Pro-active Trusteeship'*, which recognises 'the reality of anticipating, planning and managing change; provides imaginative and inspirational leadership; is committed to quality, excellence, virtuosity and flair while remaining loyal to the legacy and traditions of the past'.

Tuohy (2001, p. 376) notes that the proposal to establish the Le Chéile Trust 'presents a major paradigm shift for the future of Catholic education in this country'. Tuohy asserts that the establishment of the lay Trust was likely to result in a more generic Catholic ethos rather than an ethos reflected in the particular witness of a variety of religious congregations to the basic Gospel mandate: 'Go, teach all nations'.

Gleeson and O'Flaherty (2016) observe that Trusteeship arrangements for Catholic schools in Australia and Ireland differ insofar as the focus on founding charism remains strong and does not involve any diminution of institutional charism in

Trusteeship arrangements for Australian schools. In contrast, the focus of the Irish Trust bodies is on generic Gospel values rather than founding charism.

The move toward Trusts accelerated from the mid 2000s. Many religious congregations transferred their schools into Trusts operated by the laity during that period. It was not an easy process. Sr Una Collins of the Le Chéile Trust held that it was 'one of the most critical pieces of history in Ireland in relation to the Catholic secondary school'; it also represented 'a leap of faith'. One principal is quoted: 'The Trust was an untried, untested entity and there was a lack of confidence in it' (Griffin, 2019, p. 57). By this time, 75 per cent of Catholic second-level schools had been handed over to the Patronage of six Trust bodies. Such transfers represented a huge and successful initiative by religious congregations to ensure that their schools would continue to provide for education into the future (Griffin, 2019).

In contrast, other religious orders, such as the Christian Brothers and the Spiritans, remained alone – the Edmund Rice Schools Trust (ERST) and Des Places Education Association (DEA, now the Spiritan Education Trust (SET)), respectively. Accordingly, they did not face the challenges that confronted other Trusts in amalgamating their charisms and reliance on Gospel values. As Griffin (2018) observes, concerns emerged from teachers about how their schools' established ethos would be protected. To conclude, the debate and discourse that occurred in the 1990s with the intention of establishing an alternative governance framework were judicious. Whilst the motivations of such discussions were instigated by internal and external challenges, the importance of the unique charisms of the orders was to the fore.

2.5.4. Trust Charters

Several of the Irish Catholic education Trusts have published a charter. These charters are an expression of the various Trusts' missions. For the multi-order Trusts, the

charters are an opportunity to highlight the heritage and philosophy of the different congregations that joined the Trust. For single-order Trusts, the charters are an expression of their unique founding charisms.

Griffin (2018) explains that the 'CEIST Charter defines the vision, values and framework by which the new Trust, its executives and schools will operate' and sets out the Trust's vision and mission statements, indicating how the values of the charter can be lived out. The Le Chéile Trust (2019) say they seek to build a learning community that welcomes and witnesses through the lens of their charter, and adds that the school draws its identity from the richness of its religious and cultural heritage and the charism of its founder(s). ERST (2020, p. 5) state that they 'have been entrusted by the Christian Brothers with the stewardship of the vision of Blessed Edmund [Rice] and undertake to provide Catholic education, in line with the values as stated in the Edmund Rice Schools Trust Charter'. Conaty (2015) states in the Spiritan Education Trust document *Education for Transformation through Gospel Values* that much great work has been done on incarnating the Spiritan charism in the Spiritan schools, and that many possibilities offer themselves for actualising that ethos and mission as they work together in the future. The Jesuit Charter (2011, p. 2) states that a distinctive spirit still characterises any school that can truly be called Jesuit. The charter asserts that 'distinctive' is not intended to suggest 'unique', either in spirit or method. The purpose is instead to describe 'our way of proceeding'.

Within the multi-order Trusts, the charters reference the coming together of the religious congregations. The charters are highlighted as the lens by which the schools will accomplish their Trust's mission. The CEIST Charter (p. 2) describes how the congregations 'have come together to form a designated organisation that will be faithful to the founding intention, hold our traditions and enable our schools to

navigate, true to their identity, the next stage of their life journey'. The Le Chéile Charter (2008, p. 3) asserts that their congregations shared a common purpose in education, yet each congregation brought its own charism to the running of the schools. This charism is entrusted to each school through the board of management.

For single-order Trusts, the emphasis is on the uniqueness of their individual charisms. The ERST Charter (p. 13) encourages students to grow in their own faith and religious practice while at the same time respecting the distinctive Catholic ethos of the school. The ERST Charter adds that '[w]e are gifted with the charism of Edmund, our founder, and we are responsible for nurturing it' (p. 26). The Spiritan Education Trust's *Education for Transformation through Gospel Values* says the Spiritan charism 'is a gift that shines through the lives of our founders and other Spiritans, a gift which touches and enriches us. It challenges us to be faithful in an age when the call to authenticity is one of the signs of the times' (p. 16).

2.6. Founding Charisms

This section of the literature review situates the term 'charism' and explores the term's relevance to religious congregations. In the context of this research, 'charism' relates to the unique founding intentions that the religious bestowed to the schools they established. How this unique heritage or gift is lived out in school life is referred to as the school's ethos or characteristic spirit. The term 'ethos' is further explored later in this chapter.

Each religious congregation has its own unique charism received from the Spirit, through its founder, to realise a specific mission in the Church. This gift (charism) is handed down through the centuries and enriched by all who are called to live it (Keating, 2005). In the Vatican document *Lay Catholics in Schools: Witnesses to Faith* (1982), the cultural patrimony handed down from previous generations is emphasised

as a feature of a Catholic school. Whatever the school's origin, each Catholic school can preserve its own specific character, spelled out in educational philosophy, in rationale, or indeed in its own pedagogy. The Le Chéile Trust (2008, p. 9) state that '[t]he Charism is a gift to the members of the congregation, and it is also a gift to the Church'. It is this gift that is nurtured by the school community and the preservation of congregational charism preserves that gift within the Church.

2.6.1. Defining Charism

Lydon (2009, p. 42) explains that the word 'charism' is derived from the Greek word 'chárisma'. The Congregation for the Doctrine of the Faith (Vatican, 2016, sec. 4) is in agreement when they state that 'Charism' is the transcription of the Greek word 'chárisma', which occurs frequently in the Pauline letters and also appears in the first letter of Peter (see *The Pauline Letters*, 2022; *The First Letter of Peter*, 2022). This term has a general sense of 'generous gift' and is used only in reference to the divine gifts in the New Testament. Lydon references a dictionary's (*Oxford English Dictionary Online*) theological usage of the term 'charism' as 'free gift or favour specifically vouchsafed by God, a grace or talent'.

It is important to note that charism is, in essence, a Pauline concept. Lydon (2011, p. 43) links grace [charis] and gift [charisma]. Grace then is the universal gift (xa´riw) of God through Christ to all the baptized as a result of which the Christian is called to share in the divine life of Christ, thereby linking fundamentally the nature of grace and vocation. A charism could be described as the realisation in practice or the concretisation of this universal gift. While the nature of grace is univocal, a charism can take on a variety of forms, reflected in 1 Corinthians 1:7. Paul is, therefore, implying that gift is not synonymous with grace but is a result of it. A charism is the realisation in practice of grace, a gift which enables the believer to contribute to the

common good. In 1 Corinthians 12: 27-28, Paul gives his fullest classification of charisms which includes 'first of all apostles, second prophets, third teachers, then workers of miracles, also those having gifts of healing, those able to help others, those with gifts of administration' Although there are a variety of gifts, they must, however, work together for the benefit of the community. Charism is, therefore, linked with ethos (Lydon, 2011, p. 43).

In using the term 'charisma' in the context of late modernity, Lydon observes that references are almost exclusively cited from the work of Max Weber. Weber's theory on charism is outlined further in section 2.6.5. (Lydon, 2009, p. 42). The word 'charism' does not appear in the Code of Canon Law (Weisenbeck, 2008). Charism is a term that is used extensively in the discourse of Catholic education but one that suffers from imprecision (Green, 2014). Its widespread but sometimes vague usage can both devalue its theological richness and create ambiguity as to the nature of the phenomenon being discussed.

Interestingly, Lydon (2009, p. 44) makes the point that there are references to the use of the term charism in the context of leadership in the earliest Apostolic Fathers. For example, Ignatius of Antioch (c. 35-110 CE) speaks of the charism of authority in the context of the local Bishop, emphasising strongly the notion of collegiality in the context of the mutual relationship between the faithful, the presbyterate and the Bishop. Ignatius goes on to claim that the leadership style of the Bishops and presbyters should model that of Christ and the apostles. Lydon goes on to suggest that Thomas Aquinas' (c.1227-1274) treatise on the gift of religious life to the Church is placed at the conclusion of his exposition of the role of the virtues in Christian living and focuses on growth in virtue and its concomitant ability to inspire others.

Murray (2002, p. 132) states that while St Paul contributed the word 'charism' to our vocabulary, Paul VI gave the expression a specific meaning for religious men and women. First used in a theological context by St Paul, the term was often translated into Latin as 'gift' or 'grace' (p. 132). It is relevant to note that charism is the framework upon which schools' ethos is articulated. Lydon (2021) defines ethos as constituting the intellectual web or network of ideas, principles and values, the foundation upon which relationships of trust can be established within an organisation. This definition, according to Lydon moves seamlessly to culture – the incarnation of the ethos, the realisation in practice of such intellectual web or network of ideas.

2.6.2. Post-Vatican II Documents and Expressions of Charism for Religious Orders

Several conciliar documents issued after Vatican II highlight the importance of religious orders' founding charisms in expressing the Catholic faith within Catholic education. A conciliar document is issued by an ecumenical council of the Vatican and approved by the Pope (*Catholic Dictionary*, 2022). In the document *Apostolic Exhortation on the Renewal of Religious Life* (Paul VI, 1971), Pope Paul VI reminds religious orders of their obligation 'to be faithful to the spirit of their founders to their evangelical intentions and to the example of their sanctity'. This highlights the importance of the founders' charisms in 'reawakening hearts to truth'. The exhortation insists on the religious obligation to be faithful to the spirit of their founders, their evangelical intentions, and the example of their sanctity. A 1977 document titled *The Catholic School* states that the 'Church herself in particular looks with confidence and Trust to Religious Institutes which have received a special charism of the Holy Spirit and have been most active in the education of the young' and asks that 'they be faithful to the inspiration of their founders' (Vatican, 1977, para. 89). Later, *The Religious Dimension of Education in a Catholic School* was issued by the Vatican in 1988. The

purpose of this document was to offer 'guidelines for reflection and renewal'. It states that most Catholic schools are under the direction of religious congregations, whose consecrated members enrich the educational climate by bringing the values of their own religious communities. It emphasises that each congregation brings the richness of its own educational tradition to the school, found in its original charism, whereby its members each bring the careful professional preparation required by the call to be an educator (Vatican, 1988, sec. 35). The document titled *Educating Together in Catholic Schools: A Shared Mission Between Consecrated Persons and the Lay Faithful* (2007, sec. 27) asks that the spirit of the founders and foundresses be kept alive, as 'Founders and Foundresses paid special attention to the formation of the educators and they often devoted their best energies to this'. This spirit is referred to as being a particularly precious aspect of the tradition of the Catholic school. Archbishop Eamon Martin (2015) states that added richness and diversity to the understanding of the 'Catholic school' is rooted in the vision and 'particular embodiments' of the foundational charisms of various religious congregations. Kenny (2004, p. 406) discusses how 'individual discernment has assumed an importance' and asks: 'How does the spirituality of the Gospel and the mission of Jesus and the charisms of founders and foundresses continue to become the ground of our being for our time and our place?'

2.6.3 The Relevance of Charism to Religious Orders

This section of the literature review examines how religious congregations' different founding intentions may impact their understanding of their role in Catholic education. Gleeson and O'Flaherty (2016, p. 47) observe that the special character of denominational schools is recognised in the 1998 Education Act. Citing Coolahan (2014), the writers observe that the numbers of religious teachers in schools have

declined dramatically, and thus, 'it has become more difficult to distinguish Catholic from state-funded schools in many respects'. This decline has led to the establishment of lay Trusteeship bodies to take control of Catholic schools, and these Trusts incorporate schools belonging to a number of religious orders, each with their own distinctive founding charism (Gleeson and O'Flaherty, 2016). The charism of the different founders exerts a unique influence on the development of the habitus of each congregation so that the ethos of the schools of different congregations operating in the field of Irish education may vary considerably. Keating (2005) expresses the view that the culture of a school will have been influenced by the founding intentions of those who first developed the school. Cook and Simonds (2011, p. 319) ask: 'What is the charism of Catholic school education today?' and 'What is its distinctive purpose and unique gift to the Church and society?' This is worth interrogating further from an Irish perspective. According to Cook and Simonds (2011), Catholic school leaders and scholars must address these questions 'if we want Catholic schools to remain relevant and a worthy investment in to-day's competitive educational arena where choices are increasing but financial resources are not'. In this sense, the charism of the founder and the spirit of the order are intended to significantly influence the culture and work of Catholic schools derived from these traditions and origins. If mission statements can be taken as some evidence that particular charisms were still active in some schools, then the influence of charism must be considered in any analysis of Catholic schooling (Grace, 2002).

However, in the context of schools founded by religious congregations, one must take account of the congregation's unique charism and add to this definition a phrase such as 'and to the founding intention of the congregation' (Keating, 2005, p. 44). It is noteworthy that the documentary analysis conducted for this research (Findings 4.11)

found that all of the Trust charters analysed cited the founding charisms of the individual religious orders as being key to the missions of the Trusts. Tuohy (2001, p. 380) contributes to the discourse pertaining to the significance of religious congregations' founding charisms in the educational enterprise. Referencing the CORI document *Religious Congregations in Irish Education: A Role for the Future?* (CORI, 1997), Tuohy asserts that the document proposes 'that religious now need to find new ways of positioning themselves in relation to the education system, creating new educational experiences for young people and communities to help break the cycle of poverty'. Tuohy contends that '[w]itness to the Gospel is seen as a service and commitment to the marginalised. In this context, the question is raised whether a continued investment of their scarce resources in schooling is the best means for religious congregations to promote the charism' (p. 376).

2.6.4. Are Founding Charisms Lived Out in a Private Space or Public Sphere?

The introduction to this research distinguished between founding charisms and ethos. The term charism relates to the unique founding intentions that the religious order bestowed to their schools. Ethos defines how this unique heritage or gift is lived out in school life daily. As the research explores the role of founding charisms for Trust bodies, it is imperative to explore if the ethos arising from the founding charism is lived out in a private or public sphere. As suggested in section 3.2, if Bourdieu views power as being culturally and symbolically created, how does this translate to the life of a Catholic school? Hogan (1984) offers a useful perspective when he suggests that the tension of arriving at an understanding of the term ethos brings 'custodial conception' versus 'habitual' or 'habitus' to the forefront. This highlights a contrast in whether the discourse surrounding ethos occurs in the public sphere or in a private space.

Simply put, is ethos custodial or habitual? Hogan (1984) attempts to define ethos by observing that '[p]erhaps the adjective "custodial" best describes this conception of school ethos' (p. 695). Further, he contends that the school or educational system authorities view themselves mainly as the custodians of standards that are to be preserved, defended, and transmitted through the agency of schools and colleges. Considering that the research relates to the role of founding charisms in Trusts, this perspective helped in the thematic analysis stage of the research. Hogan (1984) observes that the term 'custodial' originates from the philosophical standpoint of Plato's (2001) *Republic*, where a forceful argument was advanced for protecting the youth from undesirable influences.

Further, he explains ethos primarily as the natural outcome of what goes on in school or college regardless of the kind of standard the school is formally thought to represent, and suggests that 'custodial conception' has been the most prevalent understanding of ethos in educational circles in Ireland in the past. As noted by Hogan (1984), the relevance of Aristotle's ethics is that what constitutes an ethos arises spontaneously from natural habit, or second nature, in one's daily dealings. Further, he observes that we have become accustomed to thinking of ethos as something imposed from above or as the embodiment of some officially sanctioned code of behaviour, such that Aristotle's illumination of the original sense of the word may strike us strangely at first.

2.6.5. Max Weber's Theory on Charism

Grace (2002) and Lydon (2009) discuss the German philosopher Max Weber's theory of charismatic leadership. Lydon explains that Weber defines charism as 'a gift or power of leadership or authority', in particular 'the references to grace and talent and to the capacity to inspire devotion and enthusiasm'. It is this devotion to a founder that

is evident within religious orders (p. 42). Grace (2002) observes that Weber 'elaborated the classical sociological understanding of charismatic leadership' by referring to the 'extraordinary quality' possessed by some leaders, which grants them a unique power and influence over others. Grace explains that in Catholic culture 'this notion has been recontextualised in the concept of charism whereby the extraordinary qualities of certain religious leaders are seen to be special inspiration of the Holy Spirit demonstrated, for instance, by the founders of religious orders' (p. 129). For Weber, these charismatic religious figures bring a vision of the world and ideal values adapted to the everyday social world and have consequences for future development (Shore-Goss *et al.*, 2013). According to Lydon, Weber's writing is particularly significant in the context of the contemporaneous emergence of religious orders dedicated to teaching and the significance of the charism of individual founders and their power to inspire followers or disciples, thereby enabling such orders to contribute significantly.

2.7. The Catholic School

The *Edmund Rice Schools Charter* (2020, p. 13) describes Catholic education as a ministry based on Jesus Christ's vision for humanity as expressed in his living and teaching. Accordingly, a person's life journey has the potential to be transformed by a personal understanding of and relationship with the life journey of Jesus. The role of a Catholic school is expressed eloquently by Meehan (2012, p. 20), who states that Catholic education can never be reduced to a process by which the State seeks to produce 'good citizens, or provide productive contributors to the wealth of society, or enlighten students about the wonderful new knowledge science has acquired'. Lane reminds his readers that Catholic schooling is an important part, but not the whole, of Catholic education (Lane, 2013, p. 43). As Dunne (1991, p. 20) agrees, the centrality of the school in being 'the reproductive agent of a democratic way of life on which the

survival of the state ultimately depends' cannot be dismissed. The intellectual heritage of the contemporary Catholic school is a 'rich blend of neoscholastic principles that are lightened with a humane spirit and deepened with a symbolic richness that was reclaimed at Vatican II' (Bryk, Holland and Lee, 1993, p. 54).

McKinney (2018) questions the aims of education and cites the importance of developing virtues, modes of thinking, and personal qualities, all of which enable young people to be more fulfilled as persons.

Archbishop Diarmuid Martin's concept of lifelong development is of relevance. Martin renews the challenge to all Catholic schools to give each student the skills of faith-reflection so that they can dialogue with the realities they face in today's world (Barry, 2015, p. 76). This challenges Catholic education Trusts, together with all involved in the education enterprise, to help students in the journey to reflect using the prism of faith to meet the challenges of today's world.

Meehan (2012, p. 19) notes that 'Catholic schools are distinguished by faith in the transcendent mystery of God as the source of all that exists and as the meaning of human existence'. Furthermore, this faith 'is not simply the subject matter of Religious Education but forms the foundation of all that is taught and learned and the horizon of all that takes place in the school'. Thus, students not only benefit from a 'rich heritage of wisdom but [the school] also gives them stability, a framework of meaning and a sense of direction for their lives in a time of rapid and often confusing cultural and social change'. Browne (2018, p. 12) asserts that Catholic schools rightly wish to be inclusive, but 'this does not mean the dilution of their specifically Catholic ethos'. Browne contends that 'Catholic schools should be unashamedly and proudly Catholic, but not hothouses of indoctrination or proselytism'.

2.7.1. Modernity and Change within Catholic Education

The charter document for the education Trust CEIST (2007, p. 2) states that '[t]he twenty-first century has brought new challenges, which require the creation of new structures to ensure that Catholic secondary education is a viable choice in a pluralist Ireland'. The way in which the Catholic Church thinks of itself has changed dramatically since the Second Vatican Council (Le Chéile, 2008). The Catholic Church no longer defines itself in terms of an institution and the Church recognises that God's work is present in all human activity (Tuohy, 2013a). This transition and change is present in second-level schools in what McGrady (2006, p. 139) describes as a period of transition 'in response to theological, educational, cultural, demographic, legal and constitutional change'. This change finds expression in increasing pluralism, new structures (such as the emergence of Trust bodies for Catholic schools) and changing patterns of religious commitment in schools.

In reference to the ongoing debate on denominational education in Ireland, Tuohy (2013a) observes that this discourse is almost exclusively concerned with Catholic schools. The literature highlights emerging differences between 'insider' and 'outsider' (Tuohy, 2013a, p. 25) approaches to the debate and threats to denominational education emerging from 'without' as well as 'within' (Conway, 2013, p. 8). Tuohy (2013a) says critics portray faith schools as destructive forces, drawing evidence from historical instances as opposed to current practices. Furthermore, Conway (2013, p. 8) expands this perspective when he contends that the 'threats to denominational education' come from both 'without' as well as from 'within', and both religious formation and schools' ethos is 'not taken seriously enough, and the results are sadly self-evident'.

Sullivan (2021) holds that Catholic educators have always had to draw upon and respond to the cultures in which they are embedded. Every generation of Catholic educators has had to find a way to communicate the faith in a manner that is both true to the Gospel and relevant for the culture. Indeed, a key challenge for educational provision in the Republic of Ireland has been the need to develop appropriate religious education approaches that effectively meet students' needs and rights in a democratic, pluralistic society (Kennedy and Cullen, 2021). These changing demographics facing Irish society and schooling are outlined by Sexton and McCormack (2021), who found that 'in the Irish Republic at the time of the Second Vatican Council, only 3.5% of the population were born outside of Ireland; by 2011, that figure was 18%' (Sexton and McCormack, 2021, p. 1).

The role of faith-based schools is increasingly debated within the Irish education system. According to Byrne and Devine (2018, p. 461), the Catholic schooling system in the Irish Republic 'represents an interesting case internationally because of the extent to which Catholic education is structurally embedded as normative across the education system'. However, the authors contend that Ireland is in the process of 'detraditionalisation and wider societal change'. Casson (2018) states that in a rapidly changing society, where religion itself is in the process of transformation, challenges by secularisation, changes in attitudes to authority, and de-institutionalisation are all current realities within Catholic schooling.

Bryk, Holland and Lee (1993) discuss a Catholic school's commitment to pluralism and contend that all teaching should be sensitive to students' diverse cultures. Schools ought to be welcoming places. From an Irish perspective, O'Connell (2015) says there has been considerable attention to inclusion practices within Catholic schools, with evidence suggesting that Catholic schools are already welcoming. In discussing a

forum dealing with Patronage and pluralism (Coolahan, Hussey and Kilfeather, 2012) in Irish schools, Meehan and O'Connell (2012, pp. 292–293) state that '[a] characteristic spirit vivifies a school. That is why it is so important that it is a spirit of design rather than default, that it is clear on what informs and inspires it, on its view of life, of the world, of the human person and the end to which we are made'. It is helpful to add the 'complex arena' that pluralism presents to society, as discussed by Mullally (2020), who notes that the majority of Catholic schools are now serving an increasing religiously diverse and secular population. Further complexity is presented by Lydon (2018, p. 165) ,who asserts that there is an increasing focus on what could be termed 'performativity', alluded to by Pope Francis. Lydon (2018) argues that '[i]n the context of formation for leadership, the advancing "secular age" in the words of Charles Taylor (2007), marked by separating of religion from life, a falling off of religious practice and a postmodern culture that marginalises faith, is perhaps a greater challenge' (2018, p. 165).

The uncertain landscape facing Catholic schooling is expressed well by Grace (2002, p. 5), who states that one of the purposes and the 'fundamental rationale' of the Catholic school is to keep alive and renew the culture of the sacred in a profane and secular world. This, Grace argues, is a massive and daunting educational challenge, since the nature of the sacred is not easily articulated, representing a 'struggle to conceive the inconceivable, to utter the unutterable and longing for the infinite'. A further reflection of the challenges faced by Catholic schools today is presented by Storr (2018, p. 157), who maintains that 'as many acknowledge, the Catholic school is the only regular experience of church many children and young people (not to mention their parents) now have'. McDonough (2012, p. 107) discusses the term 'Catholic distinctiveness' and claims this term is 'unstable', but its meaning continues

to transform. Throughout history, 'that transformation has had a profound effect on the self-understanding and hence character of Catholic schools'. After all, the Catholic school is not merely a sociological category; it also has a theological foundation (Vatican, 1997, para. 18).

2.7.2. A Response to Modernity

The Congregation for Catholic Education (CfCE) in Rome 'has been articulating Catholic school ethos with great clarity for the last 40 years', according to Jamison (2013, pp. 11–12). In an approach to ethos that Jamison (2013) describes as 'hard to describe but simple to live', Jamison contends that 'a stream of documents' published by the Vatican may assist a school in the articulation of ethos. According to Jamison, 'it transpires that Catholic school ethos is not hard to describe; it's been done for us', referencing these Vatican documents. Byrne and Whittle (2021, p. 16) describe Vatican II's *Gravissimum Educationis* (1965) as an apt starting point for a richer or more nuanced account of Catholic education. They note that '[i]n this short and frequently overlooked document, the foundations of Christian education are explicitly framed in terms of the rights which flow from being baptised'. A further topic emerging from ecclesial documents is a response to secularism and pluralism, not only in society but also in Catholic education. The Sacred Congregation for Catholic Education document (1977, sec. 91) *The Catholic School* refers to the 'pluralistic world', countering that the Catholic school is in a unique position to offer, more than ever before, a most valuable and necessary service to counteract what is referred to as a 'hedonistic mentality' and the 'efficiency syndrome of modern consumer society'.

In their document *Lay Catholics in Schools* (1982, sec. 18), the Vatican states that in today's pluralistic world the Catholic educator must consciously inspire his or her activity with the Christian concept of the person, in communion with the magisterium

of the Church. *The Catholic School on the Threshold of the Third Millennium* (1997, sec. 1) refers to the 'extreme pluralism pervading contemporary society'. According to the Vatican, such an attitude undermines any idea of community identity.

The documentary analysis stage of the research incorporated an analysis of the charters of the relevant Trust bodies. These charters state that the role of a Catholic education Trust body is to ensure that their Catholic ethos is promoted and nurtured in their schools. The Irish Episcopal Conference discusses the aspect of faith development in Catholic schools and states that an indicator of achievement would be that '[p]arents who choose to send their children to a Catholic primary or post-primary school will be aware of, understand and support the school's Catholic ethos' (2010, p. 204).

Discussing how the Catholic Church is responding to the challenges presented above, Browne (2018, p. 3) aptly cites the words of Pope Francis, who addressed 'all Christians, everywhere, at this very moment', inviting them to a 'renewed personal encounter with Jesus Christ or at least an openness to letting him encounter them' (Pope Francis, 2013).

2.7.3. The 'Ebbing Tide' and a 'Secular Age'

The contrasting perspectives of Arthur (1996) and Grace (2002) are explored by Whittle (2018), who references Arthur's publication of *The Ebbing Tide: Policy and Principles of Catholic Education* (1996). Here, Whittle (2018) contends that the central argument in Arthur's analysis is that there has been a shift in the approach in Catholic secondary education from a 'holistic' approach to a 'dualistic' or 'pluralistic' model. The net result is an impoverished situation for Catholic schools, as it causes the Catholic ethos and values to be regarded as something additional or separated from the secular curriculum. Contrastingly, Grace's (2002) research outlined in *Catholic Schools: Mission, Markets and Morality* (2002) presents a picture of profound tension

between the mission of Catholic schools and the educational marketplace. Whittle (2018) contends that it is too simplistic to assert that Catholicity has seeped out of Catholic schools. Scholars suggest it is difficult to secure a consensus in the literature on what is meant by 'Catholic education' (Hagan, 2016).

2.7.4. A Confessional Identity

Pollefeyt and Bouwens (2010) discuss the traditional confessional identity of the Catholic education system. They inquire about the degree to which a traditional Catholic school identity continues today. This question is raised in the context of the perceived tension between culture and Catholicism. It poses the question of 'how far a Catholic school sticks to the traditional elements of its confessional nature, as a leftover of cultural Christianity' (p. 200). According to Pollefeyt and Bouwens (2010), an 'old style' confessional school identity is continued out of habit from a 'desire to remain recognisably "Catholic", as an expression of a passive, awaiting attitude, or also just to not to have to deal with it'. (p. 200)

In discussing how Catholic schools attempted to reach out, compromise, and 'bridge the gap' between the prevailing culture and their Catholic identity, critics argue that Catholic education starts with the presupposition that all school members, whether or not they are Catholic believers, remain addressable for the Catholic message. For a long time, this was indeed the case. However, the more culture de-traditionalises and pluralises, and the more culture and Catholicism drift apart, the harder it gets to (re)connect the two. Indeed, Pollefeyt and Bouwens (2010) enquire as to whether a Catholic Trust can espouse its Catholic identity when God and Jesus Christ are not being talked about. They suggest that this approach usually results in a 'post-Christian school environment' where, although it is good to sojourn, the Catholic faith remains valued. De facto values education in a Christian perspective is an intermediate phase

toward secularising the school identity. One suggests that this is often an unintentional slide of the Catholic identity than an intentional strategy.

2.8. School Ethos

The word 'ethos' comes from the Greek word meaning habit. In its origins, ethos has to do with the development of a person's character, that is, an atmosphere where a person's values and moral habits are formed (Norman, 2003) and representing a 'pattern of belief and practice of a community that embodies and expresses its fundamental dispositions and objectives' (Jones and Barrie, 2015, p. 46). The uniqueness of these dispositions and objectives contributes to a school's ethos. School ethos is characterised in the literature as an 'elusive entity' (Norman, 2003, p. 2), being the result of many influencing factors at work in the school community. Donnelly (2000) contributes to the debate when she states that ethos is not a static phenomenon, but a 'process which is characterised by inherent contradictions and inconsistencies', and that to write of schools exhibiting a unique ethos is overly simplistic (p. 152). Furthermore, Donnelly (2000) describes ethos as a 'fashionable but nebulous term' (p. 134)

2.8.1. Ethos in the Catholic School

Williams (2001) refers to ethos as being a 'hidden curriculum' readily perceptible to visitors but rarely to the fore of the consciousness of teachers and pupils. The literature makes references to the terms ethos, climate, and culture (Allder, 1993; Prosser, 1999; Furlong, 2000; Glover and Coleman, 2005; Solvason, 2005). Glover and Coleman (2005, p. 251) posit a tendency to use the term ethos when 'more subjective descriptors are involved' and culture 'when these two are brought together as an integrative force in investigation or debate'. To support this argument, Furlong (2000, p. 59) argues that school culture is a term widely used by educational practitioners and policymakers.

Furlong asserts that some still regard school culture as a concept that is intangible, obscure, and impenetrable. Solvason (2005) adds that culture has solidity, whereas ethos is more elusive. Solvason explains that school culture is recognised and comprehended, whereas ethos is experienced. Furthermore, Prosser contributes to the discourse by contending that by the early 1980s, the terms school ethos, climate, and culture were what he terms ubiquitous (Prosser, 1999).

In her seminal paper on ethos, Allder (1993) expands this debate and explores the terms spirit, ambience, atmosphere, and climate. Allder (1993, pp. 64–68) suggests that the use of the term 'spirit' tells us that 'ethos' is very close in meaning to words that describe the 'activities, enterprises and experiences of living beings' and, in the case of school ethos, the pupils and staff of the school. Allder implies that 'ambience' is used to describe the atmosphere or feeling created in human-made surroundings. Allder (1993) notes that 'ethos' is always located somewhere in an organisation's social system, which is identified through activity or behaviour. Allder concludes that the ethos of a school will inevitably be the product of what has happened previously involving social interaction and human enterprise.

The importance for a Catholic school to be explicit about its mission emanates from the literature. In examining the term 'ethos', Daly (2017) quotes Archbishop Eamon Martin, who concedes that an 'intentional' Catholic school should be confident in its Catholic identity, deliberately nurturing its Catholic ethos while naming and demonstrating the Gospel values. In discussing the religious ethos of a school, Williams (2001) believes that a religious school resembles a church or place of worship and this resemblance is central to the notion of a religious ethos. However, according to Williams this does not prevent such schools from being hospitable to children of those who do not share the religious beliefs in question. Williams (2001)

concludes that it is best, however, 'to be honest about the character of religious ethos rather than presenting it as a mishmash of well-meaning sentiments'.

Donnelly (2000) notes that school ethos can constrain people to act in particular ways, as schools work because individuals follow rules and regulations and adapt their behaviour to fit with others, particularly those who hold positions of power or authority. Therefore, according to Donnelly (2000), ethos is a negotiated process whereby individuals come to some agreement about what should and should not be prioritised. Reaching this agreement has been shown to be remarkably difficult, and herein lies the 'dilemma of ethos'. Donnelly analyses ethos utilising three dimensions: 'aspirational', 'of outward attachment', and 'of inward attachment'. Although Donnelly (2000) notes that all dimensions are of equal value, they 'offer a different lens' for viewing the operations of schools. Both the aspirational ethos and the ethos of outward attachment can be analysed with 'relative ease', as they are either written down, or can be observed. However, the ethos of inward attachment 'is more difficult to interpret'. This, according to Donnelly, comprises the genuine priorities, attitudes, and visions that individuals hold in their personal lives and in relation to the aspirational ethos of the school (Donnelly, 2000, pp. 151–152).

2.9. Conclusion

This literature review commenced by introducing Vatican II as a significant moment for Catholic education. The researcher has explored the elements of the legislative journey that culminated in the Education Act 1998. The structure of Trusteeship was also explored. The researcher posited an understanding of the terms charism and ethos and examined the concept of Catholic schooling.

It is noteworthy that the researcher has not found any empirical research that investigates to what degree Trust bodies prioritise their orders' founding charisms. There is significant lack of research on this topic.

Of note are the Trust charters. These documents appear to have become a vessel in which charism is understood in a more contemporary context. Chapter three will outline the methodological approach adopted for this research project.

Chapter 3: Research Methodology

3.1. Introduction

At the root of all research lies what the ancient Greeks termed 'methodos'. It means both 'the path towards knowledge' and 'reflections on the quest for knowledge-gathering'. Many of the central concerns of this research are firmly rooted in the works of ancient Greek philosophers (Grix, 2001, p. 29).

This chapter commences by outlining the rationale and approach adopted to answer the research question. The research employed a qualitative case study by emerging from a constructivist-interpretative paradigm. The methodology employed the use of semi-structured interviews and documentary analysis. This research aims to offer a voice to the participants. The Trust bodies examined carry out 66 per cent of the Trust functions of Catholic voluntary secondary schools in the Republic of Ireland. The researcher analysed all data using thematic analysis with the NVivo software. The researcher commences an explanation of the research design with the ontological and epistemological stances within social sciences. The researcher addresses their positionality and explains the ethical considerations and procedures relating to the data analysis. Finally, they outline the justification for selecting a qualitative methodology within a single exploratory case study approach.

3.2. Conceptual Framework – Pierre Bourdieu's Theory of Habitus

The conceptual framework outlined in this chapter informed and guided the documentary and thematic analysis stages of this research. In agreement with Jabareen (2009), a conceptual framework is not merely a collection of concepts but a construct in which each concept plays an integral role. The rationale of a conceptual framework is not to predict the research outcome. Pierre Bourdieu's theory of habitus was the guiding concept influencing the conceptual framework of this research project.

Jabareen (2009) goes on to define a conceptual framework as 'a network' or 'a plane' of interlinked concepts that together provide a comprehensive understanding of a phenomenon or phenomena (p. 51). Miles and Huberman (1994, p. 440) offer a further description that 'lays out the key factors, constructs, or variables, and presumes relationships among them' (p. 440). In this research project, the conceptual framework provides a context and structure to study the document analysis and responses of the participants within the ontological perspective of the researcher.

This research utilised Bourdieu's (1986) theory of habitus, particularly the view of how the re-legitimisation of power is influenced by agency. The impact of power on individuals and institutions is explored by Navarro (2006), who distinguishes between the perceptions of power as debated by Pierre Bourdieu and Michel Foucault. Navarro suggests that Foucault sees power as 'ubiquitous' and beyond agency and structure. In comparison, Bourdieu sees power as culturally and symbolically created and constantly re-legitimised through an interplay of agency and structure (Wacquant, 2005). Furthermore, by viewing the Trust bodies as agents with Bourdieu's theory, the researcher could conduct the thematic analysis through a particular worldview. Grace (2002) notes that his own use of the term 'spiritual capital' in Catholic education was influenced by his reading of the work of Bourdieu (1986), particularly '[t]he forms of capital' (1986). In it, Bourdieu referenced three forms of capital: *economic capital*, *social capital*, and *cultural capital*. In 1991, he introduced another category, *religious capital*. Grace (2002) contends that this maintained a strict boundary between the priesthood (possessed of religious capital) and laity (excluded from such capital). This research explores the role of founding charisms in lay Trust bodies for education. Grace's theory is relevant, as the Trusts in question were established as lay Trusts under Catholic religious orders. Swartz (1997) asserts that such forms of capital, as

Grace (2002) discussed, are also forms of power, whether material, social, cultural or religious. For Swartz (1997), this constitutes a 'political economy of symbolic power' (p. 65). Grace (2010) defines spiritual capital as 'a form of spirituality in which the whole of the human life is viewed in terms of a conscious relationship with God, in Jesus Christ and the saints, through the indwelling of the Spirit' (p. 125).

Furthermore, Grace (2002) references Bourdieu's concepts of 'field', 'habitus', and 'symbolic power' by explaining that for Bourdieu a field is a social and cultural space characterised by particular activities, which, although they 'may enjoy partial autonomy', are internally marked by the struggles and conflicts about what must be transformed or conserved (p. 26). Grace (2002) refers to the exercise of power and the class structure within a society. Byrne and Devine (2018) discuss further the theories of Bourdieu, exploring the practices in education and observing that Bourdieu's concept of habitus was particularly useful in noting that 'a collective habitus (collusion) exists where members of a group judge and act in particular contexts in ways that are mutually understood without there being any conscious communication' (p. 463). The influence that Bourdieu's (1986) theory of habitus had on this research is further explored in Table 9.

3.3. Theoretical Framework

A theoretical perspective is a philosophical stance behind a methodology, thus providing a context for the process and a basis for its logic and criteria (Crotty, 1998). This is the discovery of 'a complexus of assumptions buried within it' (Crotty, 1998, p. 66), representing one's theoretical perspective, which is the world that the methodology envisages. Thus, the different ways of viewing the world shape the different ways of researching the world.

3.3.1. Ontological and Epistemological Assumptions

The methodological approach adopted by a researcher is supported by their ontological and epistemological assumptions. A researcher's ontological approach precedes an epistemological stance. Crotty (1998) argues that ontology sits alongside epistemology, which informs the theoretical framework. Furthermore, Grix (2001) asserts that the researcher's ontological approaches precede epistemological standpoints, thus logically preceding methodology. According to Crotty (1998), ontological and epistemological issues tend to emerge together; to talk of the construction of meaning is to talk of the construction of meaningful reality. Furthermore, individuals think in certain ways that are bound by specific cultural and social norms and parameters. The ontological stance adopted for this research will now be analysed.

3.3.1.1. Ontology

Creswell and Poth (2018) discuss ontology by asking what the nature of reality is. This is characterised by multiple realities being studied through multiple views. Hitchcock and Hughes (1995, p. 19) contend that 'when the word ontology is used, it refers to issues concerning being'. Regarding social research, ontological questions and assumptions are 'those which surround the nature of the subject matter, namely – the social world'. Thus, how is this social world perceived and understood? Ontology deals with the nature of knowledge. It is the study of being and is concerned with 'what is' by relating it to the nature of existence and the structure of reality. Ontology deals with questions: what is the form and nature of reality?

Moreover, what can be deduced about it? If a real world is assumed, then what can be deduced about it? Denzin and Lincoln (1994) and Crotty (1998) refer to '[h]ow things really are' and 'how things really work'. Thomson and Walker (2010) add that

ontology concerns the nature of reality and existence; they inquire about the researcher's beliefs and the existence of external reality. This perspective concurs with Cohen, Manion, and Morrison's (2007) study, which posits that ontology deals with assumptions concerning the very nature and essence of the social phenomena being investigated.

3.3.1.2. Epistemology

Epistemology focuses on the knowledge-gathering process and is concerned with developing new models or theories that are better than the competing models and theories (Grix, 2001). In addition, Braun and Clarke (2013) hold that the central concern of epistemology is what counts as legitimate 'knowledge'. Thus, one suggests that epistemology determines what counts as valid and trustworthy 'true' knowledge within a community. According to Grix (2001), the term epistemology is derived from the Greek words 'episteme', meaning knowledge, and 'logos', meaning reason (Grix, 2001). In citing Guba and Lincoln (1994), Cullen (2013) explains that the only way to know if something is involved is by 'standing behind a one-way mirror, viewing natural phenomena as they happen and recording them objectively' (p. 13). Thomson and Walker (2010) state that epistemology as a field of study involves huge philosophical questions about what knowledge is and how we can know anything. Hence epistemological questions surround the question of knowing and the nature of knowledge. The history of human sciences entails several theoretical debates about the sources of knowledge. They include assumptions about the form knowledge takes, how knowledge can be attained and communicated to others, what tests and criteria must be involved to establish knowledge, and ultimately who can be a knower (Hitchcock and Hughes, 1995). The following section discusses how social scientists distinguish between the competing standpoints of positivism and interpretivism.

3.3.2. Positivism and Interpretivism

Burrell and Morgan (1979) and Cohen, Manion, and Morrison (2007) explain how the second set of assumptions are of an epistemological kind (the first being ontological). These concern the very base of knowledge: its nature and forms, how it can be acquired, and how it is communicated to other human beings. A researcher's alignment in this particular debate profoundly affects how they will uncover the knowledge of social behaviour. The authors distinguish between positivism and interpretivism (or anti-positivism) based on knowledge being considered hard, objective, and tangible rather than personal, subjective, and unique. Moreover, Grix (2001) refers to these two contrasting epistemological positions of 'positivism' and 'interpretivism'. Positivism is an epistemological position that 'advocates the application of the methods of the natural sciences to the study of social reality and beyond'. Interpretivism can be seen as an epistemological position that is 'predicated upon the view that a strategy is required that respects the differences between people and the objects of the natural sciences and therefore requires the social scientist to grasp the subjective meaning of social action' (p. 27).

Positivism relies on multiple methods to capture as much reality as possible; the emphasis lies on discovery and verification (Denzin and Lincoln, 1994). Positivism is a research paradigm that involves the collection of facts and data in an objective fashion. Social scientists who advocate a stance from a positivist tradition are, for many reasons, likely to concentrate on the collection of large amounts of data, since the establishment of patterns and regularities, in addition to the testing of theories, is likely to be quantitative (Hitchcock and Hughes, 1995). This approach (positivism) does not provide the best way forward where people are the focus of the study (Robson, 2002).

Another epistemological standpoint is an interpretivist approach. This is based on a constructivist ontology where the world around us is socially constructed and not an external or objective reality. Therefore, the interpretivist approach acknowledges that the researcher is a part of what is being researched, not independent of it. Crotty (1998, p. 97) further explains that interpretivism is often linked to the thought of Max Weber, who suggests that in human science we are concerned with Verstehen (understanding). This is taken to imply that Weber contrasts the interpretive approach (Verstehen, understanding) required in human and social sciences with the explicative approach (erklären, explaining). Grix (2019, p. 74) adds that interpretivism is an umbrella term that covers just as many variations of approach to social enquiry as positivism. Interpretivist positions subscribe to the view that the world does not exist independently of our knowledge of it, that the world is a social construct built on the interaction of individuals, and that the separation of fact and value is not as clear-cut as positivism may claim. Emphasis on this paradigm is on understanding as opposed to explanation. This research was conducted from an interpretivist standpoint to give voice to the human participants.

3.3.2.1. Contextual Constructivism

Burningham and Cooper (1999) refer to contextual constructivism, where objective truth is only accessible through the construction of human experience, thought, and language (Cullen, 2013). In the context of this research project, this objective truth is accessed by access to documents and by conducting semi-structured interviews. The research design allows such human experience, thought and language to be accessed and acknowledged where the participants' unique experience and insight forms part of the research data.

Max Weber's contribution to the discourse surrounding the term charism has been previously discussed. Crotty (1998) discusses Weber's suggestion that human sciences are concerned with Verstehen (understanding) and that Weber expresses the need to focus social inquiry on the meanings and values of actors: 'Weber's Verstehen sociology locates the study of society in the context of human beings acting and interacting' (p. 68). Bryman (2001) further explains that Weber's idea of Verstehen is often considered an intellectual precursor to the qualitative research approach. Contextual constructivism best represents the philosophical assumptions that inform this research. This research relies on the discussions and interactions with actors who have been involved in the relevant religious orders and Trusts. This involves the construction of such experiences as objective reality and gaining Verstehen through the meanings and values expressed by these actors via such interaction.

3.4. Qualitative Research

As stated, this research aims to give voice to the participants. Braun and Clarke (2013) suggest that qualitative research can give a voice to a group of people or an issue and provide a detailed description of events or experiences. According to these authors, qualitative research is not a single thing. It involves processes that lead to a gain in understanding. The alternative approach is quantitative research. Quantitative methods align with a positivist worldview, while a qualitative approach is likely consistent with a researcher adopting an interpretivist stance. Blaikie and Priest (2016) observe that it is now common practice to characterise social research as either quantitative or qualitative. The word qualitative implies an emphasis on processes and meanings that are not rigorously examined or measured in terms of quantity, amount, intensity, or frequency. Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and the subject studied, and the

situational constraints that shape inquiry. Such researchers emphasise the value-laden nature of inquiry (Denzin and Lincoln, 1994, p. 4).

A qualitative research approach has been chosen for this study. It is consistent with the research question that aims to gain an insight into the role of Catholic Trust bodies in living out the founding charisms of their respective religious orders. This research approach suits the interpretivist-constructivist paradigm as outlined. The limitations of a qualitative research approach are explored by Grix (2019), who discusses the 'quantitative-qualitative dichotomy' (p. 114) and highlights the criticisms of the qualitative approach. The use of brief or limited examples relating to the explanations that raise questions pertaining to representativeness and generality, the subject of validity, as well as the immersion of the researcher in the social context, which leads to a lack of objectivity, are all highlighted by Grix (2019) as limitations of qualitative research. The researcher remained cognisant of these limitations at all stages of the research process. Creswell (2014) discusses the importance of a researcher being reflective and how their experiences and backgrounds aid the direction of their research. The relevance of such reflectiveness to this research project is explored later in this chapter.

3.5. Ethical Approval

This research was conducted in accordance with the British Educational Research Association (BERA) guidelines (2018). The principles of the BERA guidelines focus on the following key areas: responsibilities to participants; responsibilities to sponsors, clients, and stakeholders in research; responsibilities to the community of educational researchers; responsibilities for publication and dissemination; and responsibilities for the researchers' wellbeing and development.

King, Horrocks, and Brooks (2019) outline moral research behaviour as involving more than ethical knowledge and cognitive choices; it should also encompass the moral integrity of the researcher and their sensitivity and commitment to moral issues and action. According to King, Horrocks, and Brooks, the ethical practice of social research with human participants is a complex and demanding responsibility. For this research project, the researcher was mindful of the ethical implications for all those involved in the process.

For the documentary analysis stage of this research project, the documents analysed were publicly available documents accessible through the websites of the Department of Education, the Joint Managerial Body (JMB/AMCSS), the websites of Catholic Trust bodies and their schools, the library of Dublin City University, and the Irish government's statute website. No ethical implications existed for access to these documents. Owing to the public health restrictions pertaining to COVID-19, interviews were completed over a virtual platform (Zoom.us). The researcher scheduled interviews with participants at a time and date of their choosing. The principal investigator was cognisant of the guidance in 'Zoom & Data Protection: Guidance for DCU Staff' (2020). This document informed and guided the ethical process of the semi-structured interviews undertaken.

The Research Ethics Committee of Dublin City University granted ethical approval for this project in November 2020. In the context of the research question, it was important to elicit the views of stakeholders who were, at the time or in the past, involved in the establishment and operation of Catholic Trust bodies in Ireland. The interview questions were piloted. An interview schedule is included in appendix five of this thesis.

Phase one of the research incorporated documentary analysis and a literature review; this research did not involve participants. The draft interview questions were piloted. The ethical approach adopted for the semi-structured interview phase was also adopted during the pilot interview stage.

Phase two of the research comprised semi-structured interviews with the key stakeholders of the Catholic Trust bodies and religious orders. This cohort of participants included current and former chief executive officers, education officers, faith development officers, and directors. Members of religious orders who were involved in the establishment and operation of Trust bodies at the time or in the past were also interviewed. The participants were all adults who would have amassed an experience of significant years in the field of Catholic education by the nature of their position or role.

The researcher applied a process of pseudonymisation to the data. All participants were pseudonymised by the assignment of a code. The researcher stored the details in a password-protected document on a password-protected computer at the researcher's home.

The researcher informed participants, in the Plain Language Statement, that confidentiality of information could only be protected within the limitations of the law, i.e. it was possible for the data to be subject to subpoena, freedom of information claim, or mandated reporting by some professions. Given the small number of potential participants, this may have implications for their anonymity/privacy. Participants were informed that the interview would be recorded with their consent and that if they wished to not be recorded, the researcher would take notes of the interview instead. All audio, text, and other files associated with the process were

stored in password-protected files on a password-protected computer. All files associated with the research were stored on DCU Google Drive.

The opinions and comments expressed by the participants and used in this dissertation, or any associated academic papers or articles, will be pseudonymised; the researcher informed participants of the limitations of this process owing to the potential size of the target research community. The limitations of this pseudonymisation relate to the small number of Catholic Trust bodies in Ireland. Despite using a pseudonymisation process, given the limited number of Catholic Trusts, it is acknowledged that the identity of participants might be established.

3.6. Research Design
3.6.1. Introduction

This research adopted a single exploratory case study approach, with the research exploring the role of founding charisms in lay Trust bodies for Catholic secondary schools in the Republic of Ireland using documentary analysis and semi-structured interviews. The method of sampling for the interview participants was purposeful. The interview questions for the semi-structured interviews were piloted at the initial stage of the research. The design of the interview questions were guided and influenced by the literature review and the documentary analysis stages of the research. The collected data were analysed and coded using the NVivo software package. Figure 1 illustrates the phases involved in the research design.

3.6.2. The Two-Phase Approach to Data Collection

This research project utilised a two-phase approach to the collection of data. Phase one (review of the literature and documentary analysis) informed the design of the questions for phase two (semi-structured interviews).

3.6.2.1. Phase One: Literature Review and Documentary Analysis.

In the initial stage of this process, the literature review informed the methodology for conducting the documentary analysis. As the researcher defined the scope of the literature review, it became evident during this process which documents were relevant to be included in the documentary analysis phase of the research. The literature review and documentary analysis then informed the structure for the pilot interview questions.

3.6.2.2. Phase Two: Semi-Structured Interviews

After conducting the literature review and the documentary analysis, the researcher developed and piloted a list of prompt questions for the semi-structured interview phase of the research. These prompt questions were piloted during three semi-structured interviews. The feedback received from these participants guided the final schedule of prompt questions. The seven stages of an interview inquiry, as suggested by Brinkmann and Kvale (2018, p. 41) and outlined in section 3.7.2, were used in the interview question design phase.

Whilst conducting the literature review and documentary analysis, the researcher noted potential themes and concepts pertinent to the research lacuna. These themes and concepts formed the basis for the pilot interview questions. These themes were as follows:

I. What was the rationale/motivation for establishing the Trusts?

II. What were the considerations given to the congregation's own founding charisms at this stage?

III. What considerations (if any) were given by the religious orders of joining a single-order or multi-order Trust?

IV.   What is the role of a partnership model involving the Trust and their schools?

V.   How important are Gospel values to the Trust?

VI.   How do the governance/legal obligations impact on the promotion of founding charisms?

VII.   What is the role of the Trust in the safeguarding of their religious orders' charisms?

VIII.   Have adequate structures been put in place to ensure the founding intentions of the schools have been protected?

Figure 1 details the different stages employed in the research process. The final version of the interview prompt questions (appendix five) were used during the interview phase of the research.
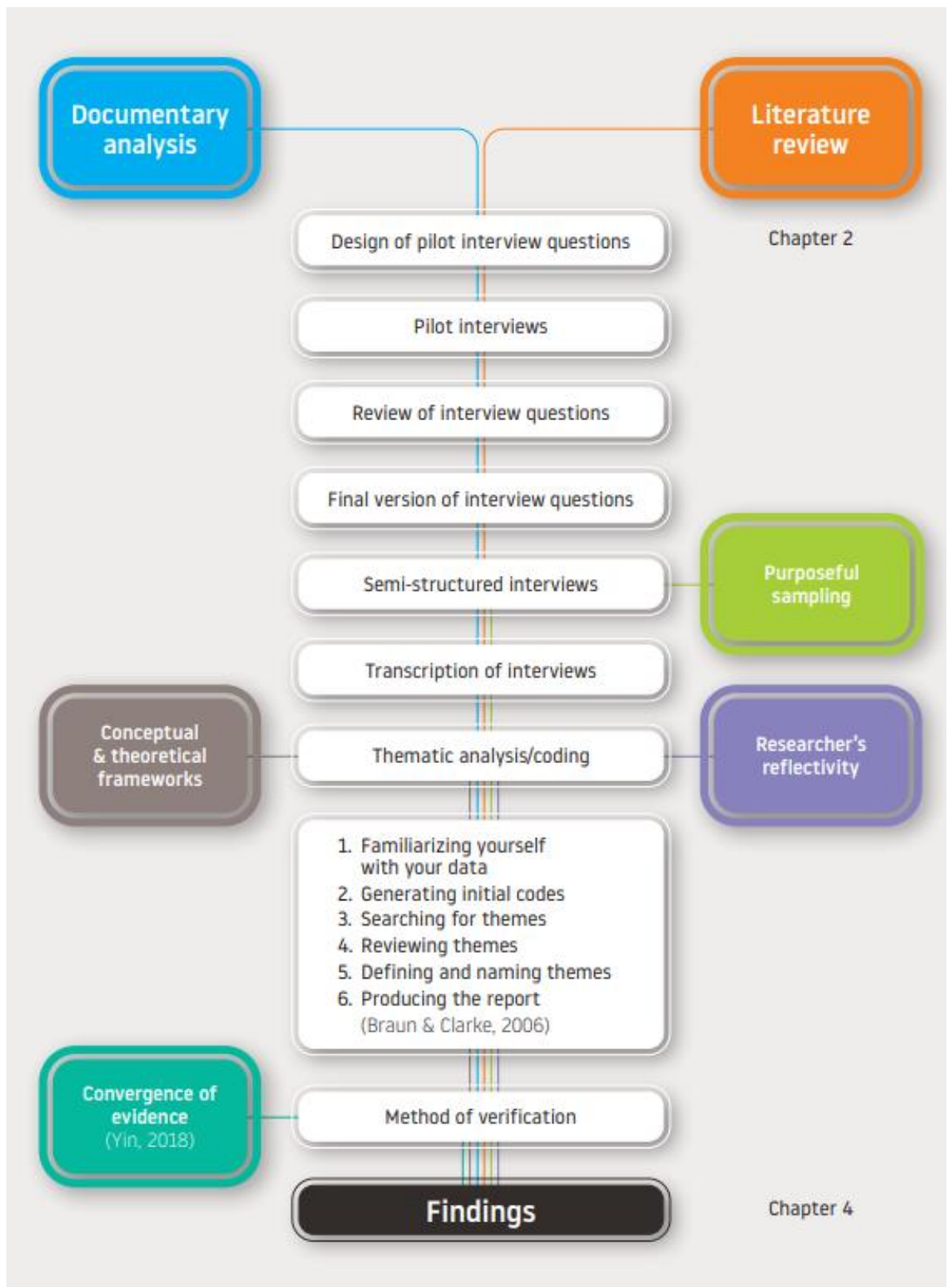
Figure 1 Research Design

3.6.3. Sampling

Sampling is described by Merriam (2009, p. 76) as the 'unit of analysis'. Merriam continues by observing that there exist numerous people who could be interviewed or documents that could be read within every study. In agreement with Creswell (2014, p. 189), the method of sampling was purposeful – Creswell describes that 'the idea behind qualitative research' is to purposefully select 'participants or sites (or documents or visual material) that will best help the researcher understand the problem and the research question'. The purpose of the research sample, i.e. the participants who took part in the research, is to provide a sufficient sample size to enable analysis of four Catholic education Trusts. Representatives from the four Trust bodies were selected to participate in this study, as they are individuals with the specific knowledge of the charisms of their respective religious orders. According to Hitchcock and Hughes (1995, p. 189), emphasis needs to be placed upon obtaining as natural and representative a picture of a situation as possible. Creswell and Plano Clark (2007, p. 112) state that purposeful sampling 'means that researchers intentionally select participants who have experience'. The researcher selected four Trust bodies responsible for secondary schools within the Catholic education sector. The rationale for the selection of the four Trust bodies was as follows:

- a sufficient sample of larger and smaller Trusts (as per the number of schools)

- a mixture of single-order Trusts and multiple-order Trusts

- the selection of Trusts who have a mixture of single-gender and mixed-gender schools

- the inclusion of a Trust with a significant percentage of fee-paying schools.

The following is an analysis of the number of schools that the Trusts selected for the research represent:

Total number of secondary schools in the Republic of Ireland 2021/2022	**728**
Total number of secondary schools in the Republic of Ireland that are classified as Catholic under ethos/religion 2021/2022	**344**
Total number of voluntary secondary schools in the Republic of Ireland that are classified as Catholic under ethos/religion 2021/2022	**340**
Number of voluntary secondary schools in the Republic of Ireland that are classified as Catholic under ethos/religion 2021/2022 and governed by one of the Trusts selected in sampling	**223**
% of the total number of voluntary secondary schools in the Republic of Ireland that are classified as Catholic under ethos/religion 2021/2022 and governed by one of the Trusts selected in sampling	**66**

Table 4 Sample Size

Participants from the four Trust bodies were interviewed. The purposeful sampling comprised the following:

- Trust bodies of religious orders that have remained 'independent', i.e., only schools founded by that religious order are in the Trust; and
- Trust bodies whose founding members include schools from different religious orders.

The purpose of this sample was to provide a sufficient sample size to enable potential comparison between the four Trusts. Representatives from the four Trust bodies were selected to take part in this study, as they are individuals with the specific knowledge of the charisms of their respective religious orders and had or are currently responsible for safeguarding this ethos. Although other stakeholders in schools have the role of implementing the Trusts' policies regarding ethos, the aim of this research is focused on the Trusts' understanding.

Chapter four outlines the findings of this research. Table 7 (Interview Participants) lists the involvement of the interview participants in the relevant Trust bodies. Several Education Trusts have established a Limited Company under company law. This

requires Trusts to appoint both members and directors. The descriptors for the participants are listed as Member of Religious Order (Director), Member of Religious Order (Member), Lay Person (Executive Officer), Lay Person (Director), or Lay Person (Member). Under company law, a 'member' is one of the company's owners whose name appears on the register of members. Members give certain powers to the company's directors to run the company on their behalf according to the Office of the Director of Corporate Enforcement (ODCE) (2022b). A company 'director' is a person appointed, usually by the members of a company, to manage the company on their behalf (ODCE, 2022a). An 'executive officer' is an employee of the company who may have a title such as 'chief executive officer', 'education officer', or 'ethos officer'.

3.6.4. Case Study

When discussing the case study approach, the researcher agrees with Stake (2006) that it is imperative to note that such a case is bound by time and place. Yin (2018) posited three types of case study, namely exploratory, explanatory, and descriptive. Case studies can be 'single' or 'multiple' in their nature. A single exploratory case study approach was adopted for this project. In agreement with Yin (2018), the exploratory case study is appropriate when there is no predetermined outcome. In further agreement, an exploratory case study approach explores presumed causal links that are too complex for a survey or experiment (Yin, 2014). In the exploratory case study, a theory is built from the research. Contrastingly, explanatory or descriptive case studies affirm an existing theory (Bassey, 1999; Stake, 2006; Creswell and Poth, 2018; Yin, 2018). A case study approach has a long and distinguished history across several disciplines. Hamel, Dufour, and Fortin (1993) trace the origin of modern social science case studies through anthropology and sociology. Accordingly, case study research begins with the identification of a specific case that will be described and analysed.

The key to case identification is bounded, meaning it can be defined or described within certain parameters (Creswell and Poth, 2018). Creswell and Poth (2018) identify five main approaches to qualitative research: case study, phenomenology, narrative research, grounded theory, and ethnography. The researcher considered the case study methodology to be the most suitable approach to this research.

Yin (2018, p. 14) holds that the essence of a case study, or the central tendency among all types of case studies, is the attempt to illuminate a decision or set of decisions: why they were taken, how they were implemented, and with what result. Here, Yin (2018) argues that a case study should be used in social research and defines the same as a strategy for doing research that involves an empirical investigation of a contemporary phenomenon within its real-life context. It is a social science research method that is generally used to investigate a contemporary phenomenon in depth and in its real-world context (p. 286). In the UK and the US, the use of case studies for educational research gained prominence in the 1970s as a reaction against the dominant positivist model that focused on measurement and statistical analysis as the means to attain valid and valuable insights into schools and classrooms (Hamilton and Corbett-Whittier, 2013). Yin emphasises the importance of following the 'four principles of data collection: the use of multiple sources of evidence, creating a case study database, maintaining a chain of evidence and the exercise of care when using data from social media sources' (Yin, 2018, p. 113).

Source of evidence	Strengths	Weaknesses
Documentation	- Stable – can be reviewed repeatedly - Unobtrusive – not created as a result of the case study - Specific – can contain the exact names, references, and details of an event	- Retrievability – can be difficult to find - Biased selectivity, if collection is incomplete - Reporting bias – reflects (unknown)

		bias of any given document's author
		• Access – may be deliberately withheld
Interviews	• Targeted – can focus directly on case study topics • Insightful – provides explanations as well as personal views (e.g. perceptions, attitudes, and meanings)	• Bias due to poorly articulated questions • Response bias • Inaccuracies due to poor recall • Reflexivity – e.g. interviewee says what interviewer wants to hear

Table 5 Replication of the sources of evidence (Documentation and Interviews): strengths and weaknesses

(Yin, 2018, p. 113)

As outlined above, the research design for this project involved the use of documentation and interviews. The researcher was cognisant at all stages of the inquiry of the strengths and weaknesses as posited by Yin (2018).

3.6.4.1. Limitations of the Case Study Approach

Yin (2018, p. 4) suggests that the researcher 'should understand and openly acknowledge the strengths and limitations of case study research'. Yin (2018, p. 113) posits that the weaknesses within a case study approach arise as a result of 'bias due to poorly articulated questions', a 'response bias', 'inaccuracies due to poor recall' and 'reflexivity'. The researcher was cognisant of the limitations as outlined above during the research process. The researcher ensured that the research questions arose from evidence emerging from the literature review and documentary analysis. As outlined, interviews were piloted in order to identify potential weaknesses.

Creswell and Poth (2018) identified the challenges associated with a case study approach, one of which is the difficulty of identifying the case that may be broad or narrow in scope. Therefore, the researcher must identify the bounded elements of the case. Furthermore, Creswell and Poth posit the importance of the researcher

establishing their rationale for their purposeful sampling. They also presented a further limitation regarding the researcher gathering sufficient data for an in-depth picture.

Furthermore, Creswell and Poth (2018) argue that deciding the boundaries of the case that is limited by time, events, and processes may also present challenges to the researcher (p. 102). All research designs have strengths and limitations. Despite bringing several benefits as a research style, case studies can inhibit the research enquiry. Criticisms of case studies have focused on their lack of rigour. A further criticism of the case study approach focuses on the biased views of the researcher that may influence the research findings. A final concern of a case study methodology is that case studies provide a minimal basis for scientific generalisation and produce narrow and idiosyncratic theories (Stake, 2006; Mullally, 2018; Yin, 2018). The research design of this study, as with many studies, is subject to limitations.

3.7. Data Collection and Analysis
3.7.1. Documentary Analysis

As outlined, the data collection method involved documentary analysis and semi-structured interviews. Flick (2014, p. 298) defines documents as covering a 'potentially broad spectrum of materials, both textual and otherwise'. For this research, the following documents were analysed as part of the research process:

- The Education Act 1998

- The Green and White Papers produced between 1980 and 1995

- The Education (Admissions to School) Act 2018

- *A Manual for Boards of Management of Voluntary Secondary Schools* (JMB, 2021). Also referred to as '*The Articles of Management*' or '*The Blue Book*'

- Charters of Trust bodies

- Ethos and admissions statements of Catholic voluntary secondary schools

- The report of the National Education Convention (Coolahan, 1994)

- Catholic Schools Partnership. *Catholic Education at Second Level: Looking to the Future*

- A Pastoral Letter from the Irish Catholic Bishops' Conference. *Vision 08: A Vision for Catholic Education in Ireland*.

In its most general sense, a document is a written text (Scott, 1990). Prior (2003) expands this definition, stating that documents also include visual elements. Grant (2019) explores the use of documents within research. She states that 'the intended use of the document, that it is transmitting information or meaning(s) either to the author or to an intended reader, … is important alongside the genre of the content'.

Grant's (2019) definition includes an array of documents, both hard and digital copies, formal and informal, ranging from official files to social media. Thomas (1966) discusses how documents are a social construction. Grant (2019, p. 13) describes the knowledge created when documents are written, as 'when you or I or any other author creates a document, we apply rules to meet social expectations and to jointly create knowledge with the (anticipated) reader(s)'.

The purpose of conducting document analysis for this research was to ensure multiple sources for the data. These include the four primary sources: interviews, observations, documents, and artefacts (Creswell and Poth, 2018, p. 52), as the collection of data is a series of interrelated activities (p. 148).

The authorship of documents is an important factor to consider when deciding on the documents to select for analysis. Bazeley (2013, p. 7) emphasised this point by stating that 'who produced a document, for whom, and for what purposes are highly relevant to analysis'. The documents were selected for this research on the basis that the

legislative development within the Irish context is pertinent because of the statutory functions given to the Trust bodies in the Education Act of 1998. Furthermore, the 2018 Education (Admissions to School) Act requires schools to state their ethos explicitly. The *Manual for Boards of Management of Voluntary Secondary Schools* (JMB, 2021) outlines the role of the school's board of management in upholding the school's ethos. The National Education Convention Report (Coolahan, 1994) was seen as critical within the discourse relating to the role and function of Patrons within Irish education (Hogan, 1997; Madigan, 2011). The charters analysed for this research relate to the four Catholic Trust bodies that were the subject of this research. As Cohen, Manion, and Morrison (2007, p. 201) explained, '[t]here are copious documentary sources of data in research and, although these are helpful for the researcher, a range of considerations has to be brought to bear on their use'. The writers explain that 'while some documents may have been written deliberately for research', some have not: 'most have been written for a purpose, agenda, an audience other than researchers'.

Using document analysis as part of a research project enables the researcher to reach inaccessible persons or subjects (Cohen, Manion, and Morrison, 2007). However, the disadvantages outlined by Creswell (2014) include the searching for documents in 'hard to find places', as well as incomplete materials (Creswell, 2014, p. 191). The documents used in this research are available within the public arena. The results from the documentary analysis are outlined in the literature review (chapter two) and the findings (chapter four).

3.7.2. Semi-structured Interviews

Yin (2018, p. 118) claims that interviews are 'one of the most important sources of case study evidence'. Interviews can be beneficial in suggesting explanations of key

events, as well as the insights that reflect the participants' relativist perspectives. As outlined, the methodology of this research included semi-structured interviews. The researcher asked participants to partake in a semi-structured interview that lasted approximately 30–45 minutes. Braun and Clarke (2006, p. 77) define interviews as a 'professional conversation' with the 'goal of getting a participant to talk about their experiences and perspectives, and to capture their languages and concepts, in relation to a topic you have determined'. Since this research aimed to explore how the Catholic Trust bodies safeguard their founding charisms, the researcher deemed the use of semi-structured interviews most appropriate to collect data.

King, Horrocks, and Brooks (2019, p. 55) deal with the area of 'the shifting research question' by stating that in qualitative studies it is not uncommon for the researcher to feel that the research question is shifting as the study progresses. Qualitative research always has an exploratory character: sometimes, a project will inevitably move in directions that may be relevant to the research topic but lie outside the scope of the original research question(s). Furthermore, flexibility is another feature required in qualitative interviewing. The interviewer must be able to respond to issues that emerge in the course of the interview to explore the participant's perspective on the topics under investigation (King, Horrocks, and Brooks, 2019, p. 63).

The following are seven stages of an interview inquiry, as posited by Brinkmann and Kvale (2018, p. 41), and are the approaches used in this research.

1. Thematising. Formulate the purpose of the investigation and the conception of the theme to be investigated before the interviews commence. The why and what of the investigation should be clarified before the question of how – method – is posed.

2. Designing. Plan the study's design by considering all the seven stages of investigation before interviewing. Designing the study is undertaken to obtain the intended knowledge and consider the study's moral implications.

3. Interviewing. Conduct the interviews based on an interview guide with a reflective approach to the knowledge sought and the interpersonal relations of the interview situation.

4. Transcribing. Prepare the interview material for analysis, which generally includes a transcription from oral speech to written text.

5. Analysing. Decide on the modes of analysis appropriate for the interviews based on the purpose and topic of the investigation and the nature of the interview material.

6. Verifying. Ascertain the validity, reliability, and generalisability of the interview findings. Reliability refers to how consistent the results are, while validity answers whether an interview study investigates that which is intended to be investigated.

7. Reporting. Communicate the study's findings and the methods applied in a form that lives up to the scientific criteria, considers the investigation's ethical aspects, and results in a readable product.

3.7.3. Thematic Analysis

The researcher has outlined the rationale for the documentary analysis. A later stage of the data analysis process involved using a thematic analysis approach to interpret the research data. The seminal paper authored by Braun and Clarke (2006) was the framework for the thematic analysis of this research. The six-phase process in the thematic analysis phase of the research process is outlined in appendix three.

The following table outlines the stages that were conducted during the thematic analysis phases for this research project. Appendix three details the 'nodes' (codes) that were generated during the various phases of the TA process.

Phase	Description of the process
1. Familiarising yourself with your data:	*Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.* **Phase 1** of this research project generated 66 'nodes' from the data. The researcher read and re-read the data over a number of weeks in order to familiarise themselves with potential themes. The process of transcription also assisted the researcher in the identification of themes emanating from the data. The researcher made sure to be mindful of biases at all stages.
2. Generating initial codes:	*Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.* The researcher progressed the common themes identified in phase 1 and created codes (nodes) in the NVivo software program. Interview transcripts that were previously uploaded into NVivo were again read and re-read. Initial themes emerging were 'dragged' to the folders (nodes). **Phase 2** generated 38 'nodes' from the data. Phase 2 of the process involved the amalgamation of similar themes from phase 1. The researcher's familiarity with the data assisted in this task. The researcher re-read the interview transcripts at this stage. Moreover, the documents were again analysed for key words and possible further themes.
3. Searching for themes:	*Collating codes into potential themes, gathering all data relevant to each potential theme.* This phase involved the researcher collating the nodes into potential themes. In **phase 3**, themes began to emanate, and the commonalities in the participants' discourse emerged. Phase 3 generated 5 themes and 23 sub-themes. This stage in the coding assisted the researcher in identifying the dominant themes emerging from the data.
4. Reviewing themes:	*Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.* The researcher again read and re-read the interview transcripts. The themes were aligned with the research question. At this phase, some themes were dropped. Codes and coding labels can 'shift and change throughout the coding process, to better evoke and differentiate between the range of meanings in the data' (Braun and Clarke, 2022, p. 55). **Phase 4** generated 4 themes and 12 sub-themes. In this phase the researcher reviewed the themes in line with Braun and Clarke's (2006) Level 1 and Level 2 analysis. The researcher re-read all of the interview transcripts and reviewed all of the documents to ensure that the themes generated in phase 3 aligned with the research data.
5. Defining and naming themes:	*Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.* **Phase 5** involved the researcher merging codes to create research coherence. The researcher was always cognisant of the voice of the interview participant.

6. Producing the report:	This phase of the coding process resulted in 4 themes and 11 sub-themes. The 11 themes produced in this phase are represented in the findings chapter. *The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.* **Phase 6**: The report of findings is presented in chapter four of this thesis. Prior to writing up the findings chapter, the researcher once again reviewed the interview transcripts and documents to ensure their integrity was being honoured.

Table 6 The phases of Thematic Analysis

(Braun and Clarke, 2006, p. 87)

A vital facet of this research was giving the participants a voice. It is important to state that the interviewer's approach was to allow the participants time and space to develop their answers and thoughts. Accordingly, the interviewer minimised the interruptions during the interview process. The researcher suggests that the data being analysed is rich and valuable as a result of the participants being allowed space to answer without interruptions. In this spirit, Rubin and Rubin (1995, p. 226) enquire, 'What did you hear' – the title of chapter 10 of their text. Here the writers explain that '[d]ata analysis is the final stage of listening to hear the meaning of what is said' (p. 226). The data analysis approach adopted in this research project is based on the six-phase approach by Braun and Clarke (2006). They define thematic analysis as 'a method for identifying, analysing, and reporting patterns (themes) within data' (p. 79).

Grant (2019) asserts that within thematic analysis (TA), the researcher must necessarily be an active agent. This concurs with Braun and Clarke (2006), who argue that within TA themes are selected as a result of researchers' interests. Therefore, researchers are not simply finding 'the truth' from within the data but creating the truth based on their preexisting knowledge and interest. Further, this is consistent with the author's epistemological and ontological approaches outlined. Braun and Clarke (2020) discuss the ten common problems in publishing TA research that cites or claims

to follow their reflective approach to TA. The first problem highlighted is the assumption that TA is one approach; the writers believe that this 'underlies most other problems' (p. 19). This diversity and plurality present a key challenge. Braun and Clarke (2020) encourage researchers to reflect on the relationship between the analytic practices – including quality practices – and ontological and epistemological foundations of their research, and to use TA knowingly, deliberatively, and reflexively. Ponterotto (2006, p. 539) observes that one of the most important concepts in the lexicon of qualitative researchers is 'thick description', and attributes the term to Gilbert Ryle (1949) and not to Clifford Geertz (1973) 'as many researchers cite' (p. 538). However, Ponterotto (p. 539) cites Geertz as follows:

> Geertz (1973) believed that the data of anthropological writing was 'really our own constructions of other people's constructions of what they and their compatriots are up to' (p. 9). Therefore, for a reader of anthropological work to gauge for herself or himself the credibility of the author's interpretations, the context under which these interpretations were made must be richly and thickly described.

3.7.3.1. Reflexivity

King, Horrocks, and Brooks (2019) contend that the emergence of qualitative research in the social sciences has, in general, brought about a more questioning approach, not only around topics of investigation but also around social inquiry. In agreement, Merriam (2009, p. 219) defines reflexivity as 'the process of reflecting critically on the self as a researcher'. This is described as a 'human as instrument' by Denzin and Lincoln (1994). Merriam (2009) contends that it is important for researchers to identify their biases, dispositions, and assumptions regarding their research. Maxwell (2005, p. 108) suggests that this helps the researcher understand how their values and expectations influence this research project. The researcher has endeavoured to be cognisant of potential biases throughout this project. Thus, the subject of reflectivity

was brought to the forefront. Once a week, the researcher reflected on their research journey through mindfulness and diary entries. Reflexivity in qualitative research invites us as researchers to look 'inward' and 'outward' explicitly and explore the intersecting relationships between existing knowledge, our experience, research roles, and the world around us (King, Horrocks, and Brooks, 2019, p. 173).

3.8. Methods of Verification

The following section of the chapter will discuss triangulation and reliability as a means of outlining the verification methods used in this research project in conjunction with Merriam (2009), who describes verification as being built into the entire process, with continual checks on the credibility, plausibility, and trustworthiness of the findings.

3.8.1. Triangulation

In agreement with Yin (2018, p. 126), a strong rationale exists for using multiple sources of evidence. The approach to individual sources of evidence is not recommended when doing case study research. According to Yin (2018), a major strength of case study data collection is the opportunity to use several different sources of evidence. Accordingly, when one has triangulated the data, a case study's findings will have been supported by more than a single source of evidence. As outlined, this research project relied on both documentary analysis and semi-structured interviews. The literature review is a further source of data that is consistent with the process of triangulation. The development of convergent evidence, or data triangulation, helps strengthen the construct validity of a case study. The multiple sources of evidence essentially provide multiple measures of the same phenomenon. It is worth stating that the researcher kept a reflection journal during the interview phase. This journal acted

as a mechanism to reflect on the data being gathered and used to align with the literature review.

3.8.2. Reliability

For Yin (2018), the goal of reliability is to minimise the errors and biases in a study. The general way of approaching the reliability problem is to make as many procedures as explicit as possible and conduct the research 'as if someone were looking over your shoulder' (p. 46). This process is described by Brinkmann and Kvale (2018) as being similar to the process undertaken by accountants and bookkeepers, who are always aware that their calculations can be audited. Therefore, a good guideline for completing case studies is to conduct the research such that an auditor could, in principle, repeat the procedures and hopefully arrive at the same results (Brinkmann and Kvale, 2018, p. 41). Reliability refers to the consistency of the results, and validity implies that an interview study investigates that which is intended to be investigated (Brinkmann and Kvale, 2018, p. 41). Issues of 'reliability and validity go beyond technical or conceptual concerns and raise epistemological questions of objectivity of knowledge and the nature of interview research' (p. 140). Reliability pertains to the consistency and trustworthiness of research findings; it is often treated in relation to the issue of whether a finding is reproducible at other times by other researchers.

Moreover, reliability issues arise in connection with the transcription and analysis of interviews, pertaining to whether the different transcribers and analysers can produce similar transcriptions and analyses. A valid argument is sound, well-grounded, justifiable, strong, and convincing. Validity in the social sciences pertains to the issue of whether a method investigates what it purports to investigate (Kerlinger, 1976, p. 138).

3.9. The Role of the Researcher

The researcher has a professional background as a secondary school teacher and principal/president of an all-boys boarding school. Thus, throughout the research process, the researcher remained cognisant of the potential biases that may exist. This is particularly relevant during qualitative research, as it is imperative that the researcher recognises the possibility of biases within their research. As opposed to a positivist approach to research where all biases are removed, qualitative research recognises that biases exist and thus incorporates them into the analysis. The researcher is cognisant of the subjectivity of the data throughout the research phases. As the researcher has worked in Catholic secondary schools for two decades both as a teacher and as a school leader, the data's subjectivity is recognised. Braun and Clarke (2013, p. 21) cite Kvale (1996), who explains that subjectivity refers to the idea that what we see and understand reflects our identities and experiences – the contexts we've existed in – a concept sometimes also referred to as 'perspectival subjectivity'. Qualitative research does not treat this subjectivity as a bias to be eliminated from research, but tends to involve contextualised analysis, which takes this into account. It is interesting to note that Creswell (2014, p. 202) suggests bias refers to the importance of the researcher clarifying the bias they bring to the research. This self-reflection creates an open and honest narrative. The researcher is in agreement with Creswell (2014), good qualitative research includes comments from the researcher about how their background shapes their interpretation of the findings.

3.10. Conclusion

This chapter has described the conceptual and theoretical frameworks underpinning this research. The researcher's ontological and epistemological assumptions were explored. It has outlined the qualitative research design, the means of data collection,

the thematic analysis approach, and the means of verification to safeguard the reliability and validity of the findings. The researcher took care to ensure that the interview participants were given a voice. The researcher ensured the participants were not interrupted, allowing them time and space to develop their responses. These responses are now presented in the findings chapter.

Chapter 4 Findings

4.1. Introduction

The research question at the centre of this study asks *What is the role of founding charisms in Catholic Trust bodies in Ireland?* This research involved interviewing individuals who have first-hand knowledge of the establishment and operations of four Trust bodies in Ireland. The researcher offers a voice to the participants. This chapter outlines the themes that emerge from the participant interviews and documentary analysis as captured during the thematic analysis stage of the research process. Nine findings are presented (findings A–I). Each interview participant is assigned a code **(P01–P19)** to protect their anonymity. Table 7 outlines the involvement of the interview participants in the relevant Trust body. To further protect the anonymity of the participants, Table 7 does not state if the interview participant is currently or was previously involved in the Trust.

Participant	Role in Trust
P01	Member of Religious Order. Member
P02	Lay Person. Executive Officer
P03	Member of Religious Order. Director
P04	Member of Religious Order. Director
P05	Lay Person. Executive Officer
P06	Member of Religious Order. Director
P07	Lay Person. Executive Officer
P08	Lay Person. Member
P09	Lay Person. Executive Officer
P10	Lay Person. Member
P11	Lay Person. Executive Officer
P12	Lay Person. Executive Officer
P13	Lay Person. Executive Officer
P14	Member of Religious Order. Director
P15	Member of Religious Order. Director
P16	Lay Person. Director
P17	Lay Person. Director
P18	Member of Religious Order. Member
P19	Lay Person. Executive Officer

Table 7 Interview Participants

Findings A - C relate to why the Trusts for Catholic education were established.

4.2. Document Analysis

The methodology for this research encompasses a case study approach using semi-structured interviews and document analysis.

The following documents were analysed:

- The Education Act (1998)
- *The Report of the National Education Convention* (1994)
- The Green and White Papers (1992, 1995)
- *A Manual for Boards of Management* (2021)
- Education (Admission to Schools) Act (2018)
- 20 admission policies of Catholic secondary schools
- Catholic Schools Partnership. *Catholic Education at Second Level in the Republic of Ireland: Looking to the Future* (2015)
- A Pastoral Letter from the Irish Catholic Bishops' Conference. *Vision 08: A Vision for Catholic Education in Ireland* (2008)
- Five Catholic education Trusts' charters

This section of the chapter reports on the analysis conducted on the above documents.

These documents were analysed for specific mention of the orders' founding charisms, founding intentions, ethos/characteristic spirit, or the role of a Patron/Trust pertaining to the upholding of their charism and/or ethos.

4.2.1. The Education Act 1998

The Education (Admissions to School) Act (2018) outlines the statutory framework that Catholic education Trusts are bound by. The rights of Patrons/Trustees of faith schools are implicitly recognised in the Education Act 1998, which requires the board of management to:

> uphold, and be accountable to the patron (trustees) for so upholding, the characteristic spirit of the school as determined by the cultural, educational, moral, religious, social, linguistic and spiritual values and traditions which inform and are characteristic of the objectives and conduct of the school. (Government of Ireland, 2018, sec. 15(2)(b))

It is worth noting that Catholic education Trusts appoint nominees to their schools' boards of management. In the case of voluntary secondary schools,

Trusts have the legal authority to appoint four of the eight board members. One

of the Trust nominees also acts as the chairperson of the board of management.

4.2.2. The Report of the National Education Convention (1994)

The report of the National Education Convention (1994, p. 181) states that:

> It was agreed that the [1992] Green Paper had paid insufficient attention to the rights, roles and responsibilities of Patrons/Trustees/Owners, and when it stated that there should be 'minimum intervention' from Patrons/Trustees it indicated a misunderstanding of their position.

4.2.3. The Green and White Papers (1992, 1995)

It is noteworthy that the Green Paper (1992) made no reference to school ethos or

characteristic spirit (Madigan, 2011, sec. 3.44).

The White Paper (1995) that followed allayed the fears of Trustees (Madigan, 2011).

The following references, amongst others, were made in this 1995 document:

> Every school has a tangible quality defined by its physical and organisational structures. However, it also has the critical, intangible character called 'ethos', which encompasses collective attitudes, beliefs, values, traditions, aspirations and goals. It is important to emphasise that the ethos of a school is an organic element, arising, first and foremost, from the actual practices which are carried on in that school on a daily, weekly and yearly basis. (1995, p. 11)

> The protection and promotion of the school's ethos is also a particular and legitimate right of those patrons, trustees, owners and governors to whom parents entrust the education of their children. While each school may properly nurture and support its particular ethos, it is also obliged to acknowledge and reflect the principles and requirements of a democratic society, respecting the diverse beliefs and ways of life of others. (1995, p. 11)

> The functions carried out by patrons, trustees, owners or governors differ between sectors and schools. In addition, a variety of arrangements exists between schools in regard to beneficial ownership and the control of schools within the terms of leases, trusts or other legal situations. In virtually all cases, the functions of patrons/ trustees/ owners/ governors relate to the original promoters and founders of schools, the most important of which is ensuring the continuity of the ethos of the school concerned, including a distinctive religious ethos. (1995, p. 156)

4.2.4. A Manual for Boards of Management (2021)

The JMB/AMCSS *Manuel for Boards of Management* (Articles of Management) refers to schools' founding intention and characteristic spirit:

> The characteristic spirit of a voluntary secondary school flows from the intention for which it was founded and the values that were articulated at the time of its foundation. The introduction of boards of management, the appointment of lay principals together with the establishment of new trust bodies, have led to a revisiting of the founding intention and a reappraisal of the core values that guide the operation and activities of the school. This reappraisal has led to schools articulating their primary goal or purpose in a Mission Statement. The Mission Statement is the culmination of dialogue involving patron/trustees, board of management, staff, parents and pupils. The Mission Statement reflects the aims and objectives set out in the religious and educational philosophy which trustees have appended to the Articles of Management under the Second Schedule. (2021, p. 4)

> The ethos or characteristic spirit is the practical expression of this philosophy as it is lived in an evolving way, true to certain core fundamentals but open to new challenges and operating procedures. The ethos or characteristic spirit of the school, animated by the values of the Gospels, will be evident not only from the specific religious rituals of the school but also from the quality of the interactions between all of the partners involved in the life of the school and from the school's Christian commitment to the needs of people beyond the school community. Essential ingredients in the ethos of the school are instruction in the Catholic faith, Masses and liturgical celebrations, retreats, social awareness projects and provision of chaplaincy services. (2021, p. 4)

4.2.5. Education (Admission to Schools) Act (2018)

Section 7 of the Education (Admissions to Schools) Act 2018 states that:

> An admission policy shall—
> (a) set out the characteristic spirit and general objectives of the school.
> (c) (iv) in the case of a school whose objective is to provide education in an environment which promotes certain religious values, where the school refuses to admit as a student a person who is not of that denomination and it is proved that the refusal is essential to maintain the ethos of the school.

The 2018 Act instructs schools when publishing their updated annual admission policy that a statement should be set out outlining the school's characteristic spirit (wording as per The Education Act 1998). It is of note that the 2018 Act also makes references to the term 'ethos'.

4.2.6. School Admission Policies

The school admission policies that formed part of the document analysis refer to the

Trustees, the Trustees' charisms, the values associated with Catholic education, and

the rights of parents under the Education Acts of 1998 and 2018.

4.2.7. Catholic Schools Partnership. Catholic Education at Second Level in the Republic of Ireland: Looking to the Future (2015)

The following references are made in the CSP's *Catholic Education at Second Level*

in the Republic of Ireland: Looking to the Future (2015) pertaining to Catholic Trust

bodies for education:

> The deeds and charters mentioned in the [Education] act [1998] are important documents which articulate the vision and philosophy of education based on the founding intention of the school or network of schools. the new trustee bodies established in recent years have all devoted significant time and resources to creating their charters. these are very important documents for voluntary schools as they give expression to the founding intention in a contemporary idiom. (2015, p. 18).

> If such schools are to remain truly voluntary, they must re-imagine their founding intention. this re-imagining must take account of the challenges faced by such schools. at the same time they must deal with the issues of funding and the relationship with the state. (2015, p. 30)

> There is no such thing as a value neutral education. All schools, whether established by the state or by one or other voluntary group, necessarily and implicitly espouse a vision of the human person and give expression to a particular ethos by their choices, actions and priorities. (2015, p. 9)

> The funding of the trustee/patron function is a particular difficulty for the voluntary sector. Trustees of schools have duties which are identified in the education act. The trustees of any school promote and protect its ethos and philosophy. they are involved in appointing the board of management, in supporting building projects, in financial controls, in developing policies (e.g. the admissions Policy), and in providing advice and supports to schools. (2015, p. 39)

4.2.8. A Pastoral Letter from The Irish Catholic Bishops' Conference. *Vision 08: A Vision for Catholic Education in Ireland* (2008)

The 2008 Pastoral Letter from The Irish Bishops' Conference entitled *Vision 08: A*

Vision for Catholic Education in Ireland asserts '[t]he provision of skilled professional

educators, informed and committed to a Catholic ethos is an essential part of this contribution (2008, p. 4). Furthermore, the document states 'Catholic education values tolerance and inclusiveness. In an increasingly multicultural society, it is open to generous dialogue with Christians of other traditions and those of other faiths and none, while remaining true to its own distinctive ethos' (2008, p. 8).

4.2.9. Trusts' Charters

Five Trust charters were selected to form part of the documentary analysis stage of the research. The following relates to the Trusts' founding intentions:

> CEIST (p. 2) have come together to form a designated organisation that will be faithful to the founding intention, hold our traditions and enable our schools to navigate, true to their identity, the next stage of their life journey'. Parents support the faith life of the school by actively upholding the ethos, values and principles of the Charter. (p. 13)

> ERST (p. 13) It encourages them to grow in their own faith and religious practice while at the same time respecting the distinctive Catholic ethos of the school. It celebrates the richness and diversity of the school community. Each Edmund Rice School seeks to interpret faithfully the mission of Jesus Christ and the charism of Edmund Rice in its educational community according to this Charter (p. 26). We are gifted with the charism of Edmund, our founder, and we are responsible for nurturing it. Empowered by the Holy Spirit we share this gift with all our brothers and sisters, but especially with the poor, the powerless and the oppressed. (p. 26)

> Le Chéile The congregations shared a common purpose in education, yet each congregation brought its own charism to the running of the schools. This charism is entrusted to each individual school through the Board of Management (p. 3). A Charism involves a particular call to Faith. It is a way of reading and responding to the Christian message. In Religious Congregations it is seen in the choice of ministry and the way the members of the congregation engage in that ministry. The Charism is a gift to the members of the congregation, and it is also a gift to the Church. The gift is nurtured by the community life and spirituality of the Congregation. Preserving the Charism of the congregation means preserving that gift within the Church. (p. 9)

> SET (p. 3) As *Education for Transformation through Gospel Values* shows, much great work has been done on incarnating the Spiritan Charism in our Spiritan schools, and many possibilities offer themselves for actualizing that ethos and mission as we work together in the future; may we be blessed in our common task and service. The Spiritan charism

is a gift that shines through the lives of our founders and other Spiritans, a gift which touches and enriches us. It challenges us to be faithful in an age when the call to authenticity is one of the signs of the times. (p. 16)

Trust Charter	A	B	C	D	E
Ethos	2	3	5	37	0
Characteristic Spirit	0	0	0	4	0
Founding Intention	1	0	0	5	0
Charism	0	2	19	2	1

Table 8 Word Analysis of Trust Charters

The text from the Trust charters (A–E) are represented in the following word clouds.

It is acknowledged that the search for specific words is a limitation of the documentary analysis process.

4.2.10. Word Cloud Analysis of Trust Charters

A word cloud analysis was conducted on the charters of the four Trusts using the NVivo software package. Certain words were excluded from this process in order to protect the anonymity of the participants.
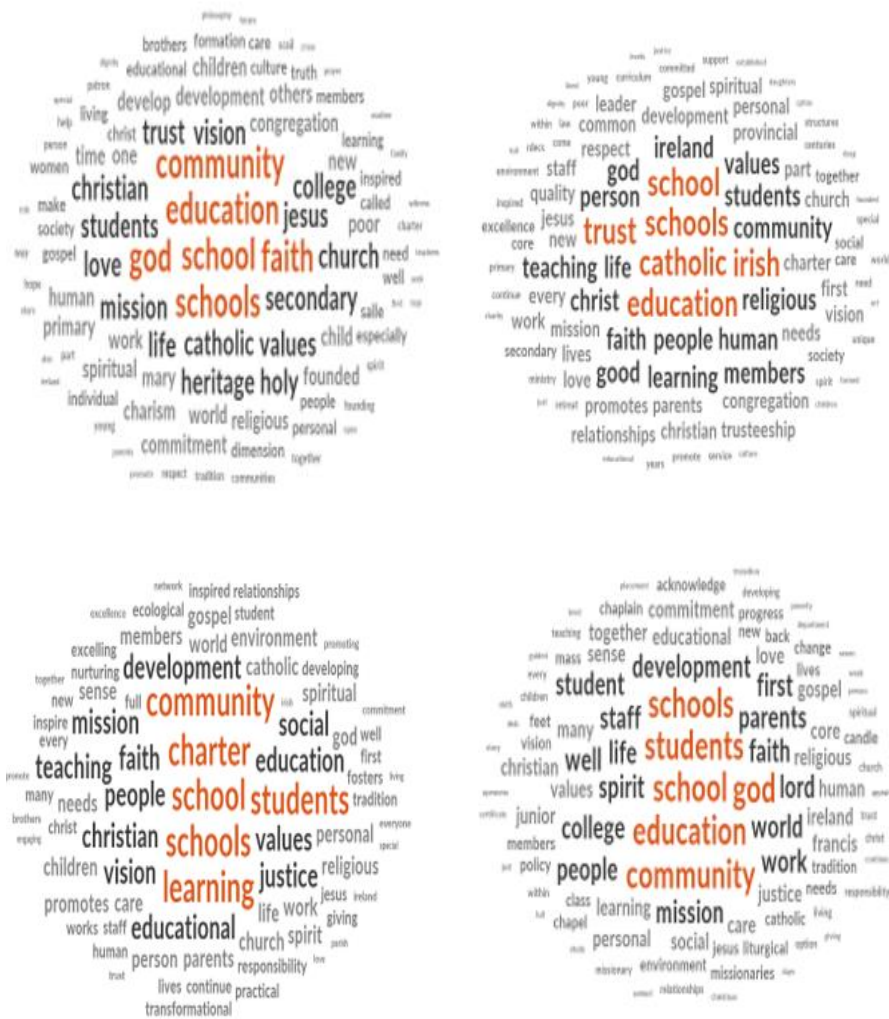
4.2.11. Summary of Document Analysis

All of the documents analysed were publicly available. The Education Act 1998 gives explicit rights to Catholic Trust bodies for education to uphold their characteristic spirit. Furthermore, the 1998 Act gives these Trust bodies a specific and defined mandate in their interactions with their schools. It is noteworthy that the documents preceding the passing of the 1998 Education Act present an uncertain picture of the role of Trustees as well as the position of ethos within faith schools. Such deliberations as the National Education Convention (Coolahan, 1994) and the Green and White Papers (1992 and 1995) illustrate the uncertainty about the role religious orders'

founding intentions would contribute to the Catholic school system. The Education (Admissions to Schools) Act 2018 requires schools to explicitly state their characteristic spirit. This requirement is an important development for Trusts, as it involves schools on a yearly basis stating their mission pertaining to their mandate as a Catholic school. One-hundred per cent (100%) of school admission documents analysed specifically stated the characteristic spirit of their schools. The 2015 document issued by the Catholic Schools Partnership refers to Catholic schools' founding intentions and ethos. Specific reference is made to the duties of Trustees in the protection of ethos. The 2008 document issued by the Irish Bishops' Conference refers to how schools should remain true to their own distinctive ethos within an increasingly multicultural society.

The Trust charters analysed refer to the founding intentions and heritage of their respective religious congregations. In particular, the charters of the multi-order Trusts recognise the distinctive charisms of their religious orders and refer to how these individual charisms contribute to how schools may live out Gospel values. The documentary analysis shows that the findings from the interview process are consistent with the mission and vision as expressed in the Trusts' charters.

4.3. Finding A: Catholic Trusts were established to protect the continuation of Catholic education.

Seventy-nine per cent (79%) of participants cite the protection and continuation of Catholic education as an important reason for the establishment of Trusts. The participants greatly value the presence of a strong and viable Catholic education sector in Ireland. Participants discuss the importance of protecting a faith-based education. They suggest that the State would not cater for this. They convey the argument that faith-based Catholic education in Ireland should not be lost. P03 states that their

congregation believes there is a value to Catholic education. *'There was a strong conviction we cannot let this go'* as *'the State will not ensure a faith-based education'*.

Participants note that multi-order Trusts (Trusts with more than one founding congregation) require the religious orders to work together for a common purpose. For the religious orders who cooperated to form these multi-order Trusts, collaboration emerged as an important element on this journey. Participant P13 states that such partnership does not occur naturally, noting that some of the religious congregations are conscious that they are smaller than others; thus, they have limited resources. This results in the decision to *'come together to find a way to preserve the schools into the future'*. The order wanted to see if they could do that by *'working together in a collaborative effort'*.

During interviews, the participants discuss alternative options to Catholic education such as ETB (Education and Training Boards) and Educate Together (a Trustee of 21 secondary schools that promotes a non-denominational ethos). The participants highlight such different models as a major challenge for Catholic schools. They feel the unique aspects of Catholic education might not be evident to parents/guardians when selecting a secondary school for their child. P08 states that *'people have not a clue'* regarding the difference between schools: *'A St Kevin's could be an Educate Together, or it could be a secondary school or could be an ETB'*. The availability of a viable Catholic education structure for parents/guardians is cited as being paramount. Trusts were established to ensure the continuation of Catholic education into the future *'offering a viable option to others'* (P04) such as the Educate Together or ETB schools.

A further topic emerging from the data is the participants' view that the Catholic Church has not only a right but an obligation to be involved in education. As discussed

in chapter two, the theological framework for such a viewpoint is based on Vatican II. *'The Church's obligation is to be involved in education'* not as much as a right but *'as an obligation'* (P01). P19 emphasises the obligation on the Trust to promote rather than just defend: *'We sometimes use the language of defence rather than promotion'* but *'Catholic education is an obligation'*.

The participants also highlight the requirement to plan for the future of Catholic education. This initial planning resulted in the establishment of Trust bodies for Catholic education. Participants raise the question, what is the alternative to these Trust bodies? Is the alternative the transfer of the schools under their governance to the State? Participants do not agree that the transfer of schools to the State would benefit the Catholic education sector. Hence religious congregations acted in planning to establish lay Trusts. *'It was in the ether and slowly coming into our thinking. What is going to happen to Catholic schools if Trusts are not established?'* (P15). The Trusts are intended to enable Catholic schools to meet the challenges of education in the new millennium.

Participants acknowledge that Catholic voluntary secondary schools have contributed significantly to looking after the vulnerable and poor in previous decades, and this is recognised as an important facet of Catholic education. Equally, they acknowledge that society has changed. They cite this change in society as a further reason why religious orders needed to devise alternative governance structures. It is also to ensure that the Catholic education sector continues to meet the challenge presented by such change. The initial rationale for setting up secondary schools may have changed, and the founding intentions of each school have adapted to meet this change. Referring to societal change in Ireland, P09 observes that *'there are still the needy, there are still*

the poor'. Such societal change is the reason why the Trust has *'looked at maybe seeing a different direction for their mission'*.

In addition, participants cite this change in society as having led to the processes of discernment that religious orders engaged in. This will be explored further in finding D. Such societal change also indicates that the original charisms of the religious orders may not be as relevant today as they were in previous decades.

For the participants, the mission of Catholic education is aligned with the religious orders' founding intentions. The next finding is that the participants believe that Catholic Trusts for education were established to protect Catholic education and to protect the individual charisms of the religious orders.

4.4. Finding B: Catholic Trusts were established to protect the individual religious orders' unique heritage and founding intention.

Seventy-four per cent (74%) of the research participants said that Trusts were established to protect the founding intentions and heritage of the individual religious orders. The participants note that the religious congregations are the owners of the voluntary secondary schools. The orders set up these schools to enable their founding intention to be a daily lived reality. The participants believe this contribution should not be lost. In the view of participants, their congregation's ethos permeates the life and spirit of the entire school. So, Trusts were established to safeguard the charism of the school. As P08 asks, *'Why bother if the founding charism is not continued in our schools?'* The participants express the view that the charism permeates the life of the school, and many believe the reason the Trusts were set up was to protect this. *'The main reason the Trust was established was to safeguard the charism of the school and the charism of the religious order'* (P07). Participants express the view that the vulnerability felt at the time led to the *'desire not to let our few schools in each case*

die out' (P15). One participant, when discussing a speech by the then Chairman of the Trust, recalls that *'What the Chairman of the Trust articulates is the preservation of the best of what the schools have contributed to our society over many decades'* (P16).

Participants express the opinion that there is a strong network of schools within the four Trust bodies researched. Participants do not want to lose this. The religious orders decided they could not continue to run their network of schools. The congregations saw the need to establish lay Trusts to have a governance structure in the future. Thus, the Trusts are seen as an important agent to protect the religious orders' heritage. *'There was a very strong network, stronger probably, than we realised. They* (the religious order) *really didn't want to lose that'* (P07). Participants also cite the lack of religious personnel entering the congregations as a concern regarding the continuation of the orders' founding intention. *'They didn't really have a future as religious congregations continuing in teaching'* so *'they wanted to see if there was a way in which they could preserve their heritage'* (P13).

In addition, the complexity in the role of Trusteeship is a factor raised for the establishment of the Trusts and the protection of individual charisms. *'The role of Trusteeship was becoming more complex'* (P11). Participants also express the opinion that there is a need for alternative Trustee structures to protect the founding charism because of congregations' mixed approaches to upholding their charism in their schools. *'There was a need for rationalisation because not only did the individual congregations have education offices, but provinces within these congregations had their own education offices. Some were strong, and others were weak'* (P02). For P13, the congregation's values and heritage *'inspired'* the Trust's Charter when they say *'We are stating our values. We are concerned to preserve our heritage.'*

The sense of relief that is felt by the participants who are members of the religious orders is palpable in the research data. This relief stems from the desire of the religious personnel to keep their legacy and heritage alive into the future. So, the best of what their schools have had to offer is a reason for the existence of Trust bodies. *'It's a wonderful relief for us to know that they've been well looked after'*. For this participant, it was not a matter of *'handing them over and saying, thank God they're gone'*. P14 concludes by adding *'I was in school all my life and I miss it every day.'*

A further reason Trusts for Catholic education were established stems from the decline in vocations in the congregations that established the four Trusts examined in this research. The next finding looks at the impact that such declining vocations had on the establishment of these Trust bodies.

4.5. Finding C: Catholic Trusts were established as a response to change.

Catholic Trusts were established to meet the changing landscape of a decline in the vocations of religious personnel. Seventy-nine per cent (79%) of participants referred to the decline in the vocations of religious personnel as a rationale for the establishment of Trust bodies for Catholic education. The declining number of religious personnel available to perform the functions of a Trustee in accordance with the Education Act 1998 was one of the reasons why Catholic education Trust bodies were established. This decline led to religious congregations starting to examine how the laity in the Catholic Church could become involved in the management of the schools under the congregations' control. The reality for the congregations at this time, according to P01, is that *'there weren't new people coming along, and we were aging, this is succession'*. This participant added, *'we're handing over to Lay Catholic people to carry on Catholic education'* (P01).

P02 describes how the Patronage of schools needed to be *'transformed'* because of the decline in religious personnel. Allied with this, there appears to have been a sense of urgency within some congregations to set up the Trusts due to what is described by P10 as the sudden nature of the reduction in people joining religious congregations. *'It was almost as if the tap was turned off on vocations in Ireland'*. P03 concurred with this. *'This lack of vocations is a wake-up call. If you don't do something while you're still around, it won't be done when you're gone'*.

The decline in religious personnel had, as might be expected, an impact on congregations' wishes for the continuance of Catholic education in Ireland. This was discussed in finding A. P04 suggests that because the number of religious personnel in schools is decreasing, *'we were concerned that there would not be the option of Catholic education'*. P05 stated that *'The main reason* (Trusts were established) *was the decrease in numbers of their religious orders.'* A further participant (P10) noted, *'The number and age range of those in the religious congregations have been in decline. The congregation was aging and there was very little new blood going in'*.

The decline in religious personnel was a significant event for those who held responsibility for the management and governance of the voluntary secondary schools. When asked why the Trusts for Catholic education were established, P09 responds by adding, *'They were looking at their future. The reality was dawning on them that they couldn't continue on managing the schools as they were.'* P11 concurred and added, *'from an operational context, they realised that they weren't going to be able to carry on into the future'*. P13 offers, *'They were the smaller congregations in secondary education in Ireland, who were looking to the future and were appreciating the fact that their numbers were dwindling'*.

Finding B highlights the relief experienced by the religious personnel when the Trusts were established. The diminishing numbers of new religious personnel joining orders was a source of worry for these congregations. For P14, this challenge was expressed as follows: *'We knew with our lack of personnel that we weren't going to be able to continue to be responsible Trustees. For years we worried and asked what is going to happen and how can we do something about it?* As a result of this lack of vocations, *'it was becoming increasingly obvious that we needed to do something before we were forced into it.'*

This change of declining vocations resulted in lay personnel running the secondary schools and the Trusts under discussion. According to participants, the change is an opportunity for the Catholic Church to embrace and promote. As P19 comments, *'I think it goes back to the understanding of the Church. The Church is not a specialised group of clerical religious people. The Church is a broader spectrum with lots of leadership roles. With a lot of engagement'.* Participants concurred that a language needs to be found to *'recognise that leadership'* (P08). Accordingly, education is seen as being one of the Church's ministries where there may be an opportunity to say, *'our school leadership is Catholic and it's not clerical'* (P19).

The impact the emergence of lay Trusts had on the school community is discussed by P07, who states, *'I suppose what emerged over time is that once it became obvious that the order was going to withdraw from the schools and hand it over to a lay Trust, suddenly schools became quite vocal'.* The tension that surfaced at the time when Trusts were being proposed is discussed as finding F.

An analysis of the interview data shows that fifty-eight per cent (58%) of participants refer to how the involvement of the laity in Catholic schools impacted the formation

of lay Trusts. Lay involvement in the Church was influenced by the Second Vatican Council (Vatican II) 1962–1965. The Council played an important role in how religious personnel viewed their responsibility within the Church and Catholic schools. The Vatican Document *Perfectae Caritatis* is described by a participant (P01) as being *'very instrumental'* in getting the leaders of the religious orders to move forward in relation to the establishment of Trusts. A contribution from P01 is noteworthy, as they refer to how the female religious took Vatican II very seriously and it was seen as a *'means of liberation from the old-fashioned regulations and monastic rules'* (P01). Two other female religious members also refer to the impact of Vatican II. These participants concur that Vatican II was taken *'very literally and very seriously'*. Accordingly, it was very much that spirit of *'cooperation and collaboration'* that was encouraged by the Vatican Council. *'The women religious took it more seriously than anybody else in the Church. A key feature of Vatican II was the move to involve laity in the Catholic Church, including education'* (P01).

Vatican II's impact on the involvement of the laity in Catholic schools is a common theme emerging from the dataset. *'I suppose along with that, what was happening too was Vatican II was encouraging the involvement of laypeople'* (P10).

Another participant (P04) references the need to formalise the involvement of the laity under the auspices of a Trust. Further, the religious personnel acknowledge the role that lay persons play in Catholic schooling. Another comment is that *'Vatican II was very much in favour of sharing the full ministry of the Church with the lay. In the documents for the laity, full responsibility for the Church was asked for from the laity. Education, obviously, would be one. The Church I think in Vatican II was genuinely determined to involve the laity'* (P06).

However, the data does indicate a reticence amongst some clergy regarding the impact that lay people may have on the evangelisation of students. P06 comments, *'We couldn't assume that they would have the spirit of the congregation'*. P11 describes how Vatican II *'called out to the religious orders for renewal. They asked them to go back to their own founding charism and to the Gospels, and so people started looking around everywhere for their charism!'* Another participant asks how the laity would support a Catholic school when *'what I would call the visible iconography is no longer there'* (P07). The role that Vatican II played in bringing laity into schools and the Church is also mentioned by P07. P19 refers to how school principals were originally suggested as possible Trust directors. This, according to the participant, would have been a *'profound decision'*, as the people responsible for the implementation of a founding charism within a school would have had a direct input into the Trust's direction. If school principals were appointed as directors of the Trusts, this would encourage a sense of ownership and accountability of Trust policies within the schools.

4.6. Finding D: Discernment brought new clarity.

Prior to the establishment of the Trusts for Catholic education, religious orders engaged in processes of discernment, involving religious congregations establishing two multi-order Trusts and single-order Trusts. The religious orders who set up the multi-order Trusts met to establish a shared understanding of their mission, and how this mission would contribute to a new Trust structure. These religious congregations engaged in two processes of discernment, which ultimately resulted in the establishment of two multi-order Trusts. The discernment process in which religious orders engaged brought new clarity to their understanding of their charism. Religious orders involved in multi-order Trusts realised that their congregations had more in common than they realised. Eighty-five per cent (85%) of participants concur that the

processes of discernment entered by religious orders had a positive effect on the orders' understanding of their founding charism. Of the participants familiar with multi-order Trusts, eight out of ten referenced the commonality of their orders' founding charism with that of other congregations and how this was a positive feature of the discernment process.

In discussing the commencement of the period of discernment, 9 out of 19 participants referenced the work conducted by CORI. The CORI education office organised several meetings where leaders of religious orders participated. These meetings were organised so the religious orders could discuss the available options regarding their role as Trustees of the schools under their ownership. P01 discusses the impetus that such meetings brought to the process. Referring to CORI, the participant adds that CORI *'had written and had talked and had met.'* A further participant (P11) recalls one leader of a religious congregation standing up and asking, *'Is anybody else concerned about the future? We don't have that many people, we don't have that many younger people who would be able to take over.'* P11 refers to this as a significant moment. P15 recalls another congregation leader saying, *'If any small congregations would like to talk to me, I would be interested in talking to them'*. The participant describes this as a foundational moment. P14 recalls how CORI organised a series of conferences with the religious who were involved in schools to look at the issue because all the congregations were looking at the same scenarios. P14 observes that it *'was becoming increasingly obvious, as those conferences went on, that the big congregations were all veering off in their own directions'*. This resulted in two processes of discernment and two multi-order Trusts being established.

The length of time involved in the discernment process is another theme emerging from the data. P15 comments that from the commencement of the CORI process, it

was several years before the Trust was established, saying, *'we met every first Friday for nine years.'* P01 states, *'we worked for three years to get it done.'* P04 recalls the process was *'quite thorough'* and continued for *'a couple of years.'* P06 remembers that schools and convents were visited *'for three years'*. And *'They heard what the teachers were saying about what does the school stand for, what are the values?'* P11 states it was *'really interesting'* from their Trust's perspective because it took them a long time. The religious congregations *'were working together as a group for about seven/eight/nine years.'* P14 asks, *'Do you know we spent two years meeting together every month before we could find common ground to even begin a collaborative Trust?'* This participant states that it took *'two long and painful years of saying we either find common ground'* or *'we disappear. It was as stark as that.'*

The processes of discernment varied. Several of the participants outline the consultation process in which the orders were engaged. P15 says that *'It was a gathering of all those charisms, founding stories, and founding intentions'*, and asks, *'how did they become one?'* This participant recalls thinking at the time, *'We're the same, actually. That was the moment for me. That it was clarified, this is about Gospel values'*. P01 says they were *'a member of the five-person project team that was charged with setting it up'* and *'that was also part of our motivation to set up the Trust that we should be working together for the good of education rather than as in individual congregations'*. In contrast, P02 believes that *'surprisingly little'* work has been invested in the process of discernment. The participant adds that the discernment process resulted in phrases such as *'in the spirit of the founders'*. That, according to the participant, *'was as far as it went on charisms'*. Furthermore, P02 adds, *'They did give pen pictures of each congregation, but after that, it was, hit every note in the Catholic repertory'*.

P03 says that *'we did research on the basic and core elements of the founding charism of each of our congregations'*. P04 recalls that *'we weren't the only congregation thinking that way'*, referencing the desire within the religious orders to examine the relevance of their charisms to contemporary education settings. P04 adds that *'A huge amount of work was done'* and *'they found that the main congregations after a lot of interaction, they had a lot in common, and basically, that their mission was to provide a Catholic education mainly for the marginalised'*. P05 points out that there was *'a considerable piece of work on looking at the characteristic spirits or the charisms of the founding congregations. The charter was a distillation of those characteristic spirits. There was a lot of work done'*.

P10 also asserts that *'a great deal'* of work has been done. P10 recalls that *'the congregation revisited their philosophy documents in the mid 1980s. Following on from that, they carried out a four-year research project involving all their schools'*. P11 recalls meeting once per month where *'the bulk'* of their conversations occurred. *'Here the representatives were examining their founding charism and their school ethos and looking to see what they had in common.'* P11 states that the founding charism is very important, *'but we couldn't dwell on the past'*, as the charism *'has to be relevant to modern living'* and it has to be *'compatible with the other congregations'* that were having a conversation with them. P11 contends that there had to be a real discernment. *'I think discernment is the only word to use about the founding charism'*.

P12 recalls how the process was considerably more complex because of the number of orders involved in the discussions, stating in relation to values that it wasn't just a case of where *'someone slipped through the Gospel and picked out a few values'* and *'I think the important piece always is that nothing is lost, and you'll understand, as an*

economist, the idea of synergy and two plus two is five.' P13 recalls that *'a huge amount of time went into discussing that'*, adding that *'so of course, there was lots of common ground'* in terms of core values, *'because it all comes back to the Gospel'.* P13 *'saw that there was common ground that would be worth pursuing.'* P14 says, *'we're all about the same thing, we're all about spreading the good news and we're all about evangelisation'.* P14 adds, *'We all do it differently and we want to hold on to the way we do it because we know we're doing it the best!'* When challenged as to why the religious personnel involved in the process are now happy with the outcome, even though the process of discernment took time, P14 states, *'We just weren't used to it. We were used to doing our own thing in our own schools'* and *'I suppose that's why the schools became so strong.'* P14 says, *'It was a very difficult piece of work'*, emphasising that the Trust now needs to *'constantly look at our statement of charism'* and *'put it into words that are understandable to people.'* P17 is of the view that the discernment process was *'an impossibly unrealistic process'* owing to a *'deep-seated sense of discomfort'.* P18 states that the discernment process resulted in a Trust structure that was *'set up with a view to ensuring that the charisms of the congregations were continued and developed in accordance with changing times'.* Participants agree that the discernment processes were beneficial, culminating in an understanding of how their charisms relate to a shared understanding of Catholic schooling in a contemporary setting.

4.7. Finding E: Trusts see Catholic Gospel values as an integral part of their mission.

A further theme emerging from the research is the importance placed on orders' founding charisms within the context of the Gospel values of the Catholic Church. With the advent of multi-order Trusts in Irish education, the participants were asked about the uniqueness of their Trust's charisms within the context of Gospel values.

Ninety per cent (90%) of respondents confirmed that Catholic Gospel values are integral to their Trust's mission. As P01 asserts, *'if the congregation is authentic at all, it is Gospel'*. Furthermore, P01 states that they *'wouldn't be overly concerned that the school would be still talking exclusively of their own individual charism. I don't think there can be a Catholic versus the congregation'*. P15 concurs with this opinion when stating, *'If it hasn't got the Gospel at the end of it is not anything'*.

When asked about the role of the Trust in promoting the orders' founding charisms, P15 is strongly of the opinion that the word *'promote'* when discussing an order's founding charism is not an appropriate word: *'Living it and behaving it, telling the story of it, relating it to Gospel values, yes, but not promoting it.'* P02 states that the aim of the Trust is to live out an overall Catholic ethos and that individual charisms would be respected and provided for in the *'fine print of the charter and local identity within schools'*. P02 asserts that the need to protect and promote Catholic education has become *'the big focus'*, as *'Catholic education had become a concept, particularly following Vatican II'*. Regarding the congregations' founding charisms, this participant observes that it is the *'implicit hope that these would be respected and remembered locally'*. P03 states that if orders' charisms are authentic, they should relate to the Gospel. *'We wanted to pass on schools that would have values, a special ethos and charism'*. Participants express the view that the ethos and the charism of congregations are only an expression of Gospel values and *'there should not be any conflict between the two at all'*, and *'if you're emphasising the charism, you're emphasising the Gospel'* (P08). Aligning to the comment made by P02 and the opportunity for orders' founding charisms to be *'remembered locally'*, P04 discusses how their feast day is celebrated in the schools that their order established, even after they had joined a multi-order Trust. When discussing support from a particular

congregation, P11 affirms, *'To be honest, we are not even sure that it's needed, because if all the orders were able to do that, would they really need the Trust at all?'*, adding that *'it's not a problem because we can live with both very much'*. P11 states that the schools within their Trust celebrate the founders' days and *'the schools really like it'*. P19 refers to their Trust's initiative in organising a trip for staff to follow in the *'footsteps of the founders'*. This participant adds that the Trust is continuing to learn about what *'might need to go in place'* and concedes that *'we probably have a lot more work to do around trying to develop that'*.

P04 says that the charter guides the work of the Trust, and the Gospel values are reflected in the charter. *'The charter of the Trust is really what guides us all'*. This participant asserts that the *'Gospel is very simple. Jesus spoke very simply and walked among the people'*. P04 highlights the problems that have been experienced in the Catholic Church, stating, *'the institutions the Church set up brought many problems with it'*. The participant adds, *'I don't see any contradiction between the Trust charter and the Gospel'*. P10 notes that the documents used by the Trust, such as those explaining the life of the founder and the ensuing charism, are firmly rooted in Gospel values. *'It is there in black and white. You can't have one without the other.'* P07 states, *'You can add all the charisms and Gospel values in the world, but if they are not being lived out and articulated you are wasting your time.'*

The search for a *'language that works'* is discussed by P12. The search for an appropriate language is also raised by P14, who says, *'I think we have to find a new way, a new language. It's lost because we have used the wrong words, we have used the wrong concepts that so many people are just longing for some sort of value system'*.

P12 adds that when discussing the relevance of Gospel values to the Trusts *'they weren't just Gospel values that someone looked through the Gospel and picked out a few values, they were congregations that in all integrity really bored down into what their charisms were'*. P12 went on to say, *'I think myself, that sometimes we forget, when we talk an awful lot about the orders' charism, that this is built on the life of Jesus, and if we didn't have Jesus, we wouldn't have any congregations and charisms'*. This participant asserts that there is the potential for people to have the impression that talking about Gospel values is moving away from congregations' founding intentions. According to this participant, *'We have moved deeper into our charism of our congregation if we can align scripture, for example, with the charism of our congregation.'* P13 states, *'I would say there's no tension, the Gospel values in the charter founding documents are the values that all the orders in their own charism embrace. The charism of a congregation has to be rooted in Gospel values, otherwise it's nothing'*.

P14 also comments on congregations' similarities when they add, *'We're all about the same thing, we're all about spreading the good news and we're all about evangelisation'*. However, P14 comments that there has been what they describe as *'a certain amount of watering down'*. This participant illustrates this comment by observing that Ireland is now very much a secular country and *'gone are the days when you knew that every child that came to a Catholic school was coming from a Catholic home where Catholic values or even mass-going can be taken for granted'*. The commonality that emerged during the process of engagement and discernment is referred to by P15, who said, *'From the moment we sat down with the facilitator, and we looked at each other and said, "We're the same, actually". That was the moment for me now, it was clarified, this is about Gospel values.'*

The uniqueness of an order's founding charism is questioned by P17, who recalls that *'charism was referred to quite often, particularly by members of the congregation, who are on the Trust board. And it's most to this extent the representation of the charism was typically through the core values. And, apart from one area. I think one is hard-pressed to say, one is absolutely unique about the Trust's charism, than say a broader Catholic school'*. This participant recalls a conversation with a priest involved in Catholic Trusts; they state this priest *'was very strongly of the view that actually this business about the unique charism of the orders was greatly overstated'*, adding, *'I know I struggle to say what was absolutely substantively different between the different Trusts'*. P18 agrees that Catholic Gospel values are paramount when discussing Catholic education. This participant also identifies the role that an order's founding charism could contribute to this conversation. *'In terms of induction and supplying materials around charism, all of those varieties of things have happened'*.

A further participant (P19) comments that the concept of charism is *'perceived within a particular culture of time and place, that does a disservice very much to the charism of the various founders'*, explaining that *'we end up speaking about charism in respect to a model of Church that might be at least forty or fifty years old'*. P11 states, *'But it's the founding charism, and our evolving ethos as well as charism. The founding charism suggests something of the past, whereas we're not dwelling on the past.'*

4.8. Finding F: During the establishment of Trusts two decades ago, competition and tension existed.

During the data analysis phase, a further theme emerges relating to the competition and tensions that existed during the establishment of the relevant Trusts. Sixty-nine per cent (69%) of interview participants referenced such competition and tension. P01 describes how competition existed between schools governed by different religious

congregations when they stated, *'There were towns in this country, where they were two convent schools. It was known that there might be a little bit of competition between them'* and *'maybe two schools weren't always necessary'*. Regarding the competition between schools, P04 adds, *'we would be watching each other's results and it was very important that we had the student who got the full marks. So that wasn't healthy.'*

Participants clearly articulate the inherent reservations experienced by the religious congregations during the discussions prior to establishing the Trusts. It is noteworthy that participants refer to an incident at a CORI meeting when a religious sister concluded, *'Well, that's it now. I've done all I can do; you are on your own'* (P01). A further participant adds, *'The silence in the room was just amazing because she knew that most people there had already made their decisions, they knew where they were off to and that's the whole idea'*. (P15)

When discussing why one overall Trust body did not emerge from the process commenced by CORI, P02 believes that *'The male orders would have been very strong'*. Also*, 'there were tensions between the management bodies such as AMCSS* (the national management body representing Catholic secondary schools) *and the emerging Trusts'*. This same participant states that sometimes the AMCSS viewed the emergence of the Trust with a certain amount of alarm, and the Trusts viewed the hold the AMCSS had on certain things with the same suspicion. The participant states that they *'realised the ultimate centre of power was always a couple of steps back.'* When asked to expand on this comment, the participant referred to the *'influence'* that religious superiors and Catholic bishops had on the decision-making processes.

P06 adds that the option of handing over the schools to the bishops was *'not explored enough'*. P06 also speaks about how the establishment of the Trusts was seen as *'invading the territory of the AMCSS'*. P08 held that large religious orders *'felt they were big enough to go it alone'*. P14 observes that the bigger congregations were saying, *'we're going our own way'* and *'we are not going to mix with you lot.'* Even if the order had joined a bigger Trust, they are of the view they would have *'disappeared, just from the point of view of numbers.'*

A further issue emerging from the interview data relates to how the emerging Trust bodies were being perceived within schools, particularly in relation to what a new Trust would mean for the schools' ethos. P04 recalls how school staff were concerned that their ethos would be *'absorbed'* into other charisms. Reference was made to religious sisters coming to the school *'doing research on the future of the setting up of a Trust'*. P04 observed that the school staff *'were very protective of our own charism'*. P04 states that they *'got quite a shock'* when they *'found that we were going to be submerged into a Trust with other congregations'*. P07 concurred: *'What emerged over time, is that once it became obvious that the schools were going to be handed over to a lay Trust, suddenly schools became quite vocal. There was distrust initially.'*

It is noteworthy that P16 clearly articulates the tension evident in the process leading to the establishment of the Trust they were involved in. P16 states that they see *'a lot of tensions in the inherited tradition, and even the identification of the charism'*. The participant states that *'a lot'* of people at the time saw the establishment of a Trust *'as an external imposition'* and the *'participative model'* was resented. P16 adds, *'Early on, I could see this rift opening up.'* P16 concludes there was *'a confluence of factors influencing the setting up of the Trust. Some of it was very much pragmatic, finance,*

property focused.' When asked about the consideration given to charism, one participant comments, *'Very little. We even found it hard to get information about the schools. I was particularly pushing for information on ethos'* (P17). A further noteworthy contribution refers to how the concept of charism *'can be the flag that stops collaboration'*. In articulating this belief, P19 explains that a Trust, like a lot of religious congregations, was very willing to *'accept Gospel values as a lead, and I think one of the hardest things really is finding a space where such collaboration is rooted in Gospel values, rather than responding to a political need or a response'*. This participant adds, *'we are constantly like the insecure child, looking over our shoulders to say, are we doing this right?'* (P19).

P03 recall that *'when we looked at this, we didn't know how many congregations might join'*, adding that *'Twenty could have joined, one could have joined'*. Their congregation concluded that they could not set up a Trust *'to promote every single little particular congregation's founding charism'*.

4.9. Finding G: Partnership and a unified mission.

The next theme emerging from that data relates to the interactions between the Trust and their respective stakeholders. Time has resulted in the Trusts' operations becoming embedded and normalised. Participants are of the view that relations with schools have developed a sense of partnership and unified mission. Stakeholders in this context include students, parents and guardians, the school board of management, and school staff. Sixty-nine per cent (69%) of participants refer to how relations with these stakeholders have improved over the time of their Trusts' life. In defining the role of a Trust, P01 says that their Trust's *'whole raison d'être and modus operandi'* relate to working with schools. P05 states, *'Really, the big thing is that the Trust engages schools on an ongoing basis.'* Another participant explains that the role of a

Trust is to support the schools to live out the key elements of the charter. This is done *'in a wide variety of ways'* and *'I don't think the Trust is seen as abstract'* (P10). The importance of what is referred to as regular, relevant, and ongoing contact with boards of management, principals, and schools is a common theme in the data. To this end, the importance of ongoing communication to build a relationship is deemed an important feature of Trusts' work. P15 describes good communication as *'vital'*, adding that such communication *'should not be static'*. P15 also asks, *'what communication structures are there between the Trust and the board of management?'* The importance of the Trust working with school staff through leadership courses is another theme to emerge from the data. The benefit of such professional development is highlighted as being *'really valuable'*, as it introduces the *'whole notion often for the first time'* of what being a leader in a Catholic school is to the staff members (P02).

Participants clearly articulate how they feel relations with schools have developed a sense of partnership and unified mission. One participant (P16) recalls how, at the establishment of the Trust, *'There was a lot of resistance. There was very little engagement with the schools.'* Further participants refer to how schools' suspicion of Trusts has been removed, stating that *'in the last ten years'* the Trust has become *'much more vibrant'*, and *'the suspicion has been removed from schools.'* P09 says that one of the features they are most proud of is how their Trust has *'gone from liaising with the boards and with the principals'* to a situation where they now *'dig down deeper'* into school life.

It is noteworthy that the building of relations between Trusts and schools is a common theme emerging from the interviews. P09 holds that a huge part of the relationship between the Trust and its stakeholders is the building of relationships. This participant refers to how the *'people you inherit'* are more difficult to *'bring with you'*. P09

continues to say, *'when you appoint your own people'* they see what you are doing and *'want to be part of it'*. Illustrating the practicalities of how Trusts engage with schools to safeguard their charisms, P12 adds that sometimes it's very simple things that *'work but bring home a message'*. P13 says that in relation to the schools they *'worked very hard at building up a relationship'* with the new principals and staff to foster a *'sense of participation'*. The importance of the process of appointing new school leadership is cited by P08, who observes, *'The appointment procedure is a central part'* in protecting schools' charisms. P14 concludes that whenever a meeting is held with schools and whatever issue is being discussed *'there's always a piece about ethos. That is what has held, that desire.'*

P15 also cites the importance of the Trusts' mission being included in the interaction with the schools *'first and foremost'*, observing that at board meetings *'the board is not going to spend sixty minutes on mission'* but *'it is most important that mission is critically built into the relationship'*. Interestingly, P19 discusses how, at the board of management level, new board nominees ask, *'where are the priests to do this?'* when discussing the promotion of founding charisms.

4.10. Finding H: Participants view the protection of founding charisms as an integral part of the role of a Trust.

A further theme emerging from the data is how the participants view the role of Trusts as being paramount in the protection of founding charisms. The statutory role of schools' boards of management in upholding schools' ethos is surprisingly absent from the interview discourse. The Education Act 1998 places the responsibility of upholding schools' ethos with the boards of management. It is noteworthy that in the course of the interviews three participants (16%) highlight the role of a board of management in upholding the school's ethos.

A key feature of how Trusts for Catholic education promote and develop their founding charisms relates to interactions with school boards of management, principals, teachers, and students. In particular, the use of training days and conferences are highlighted as key events to allow the Trusts to interact with these stakeholders. P01 says that the annual *'training days'* for principals, deputy principals, chairpersons, and for students are *'one of the vehicles'* through which the Trust can *'convey the importance of charism'*. The Trusts' annual conferences involving students are seen as an opportunity for the Trust to communicate and interact with the student body. Furthermore, conferences are seen as a chance for students in different schools to come together and celebrate the charism their schools share. P04 comments, *'I think the conferences are important'*, as they give the students a broad vision. P14 states that *'ethos permeates all work with schools. No matter what the conference is with schools, there is always the ethos piece.'*

One participant describes moving from working with a Trust to another position in Catholic education as moving from *'the rhetoric to the reality'*. This participant emphasised that the living out of a charism is *'ultimately down to the individual school'* and that it *'comes down to the leadership within schools'* (P07). P09 concurs when they state that *'There's only one reason why the Trust exists and that is to promote a certain ethos'* and, *'If it's not actually lived in the school by the principal, then it's only lip service.'* Illustrating the lived ethos in a school under their Trust's governance, P09 recalls when visiting a school that *'I was there at twelve o'clock, a lot of kids got up, they were going to visit the Mosque because they were going to pray'*. This was described by the participant as being *'very important to us'*. P15 explains that the Trust and the board can use the visual, the audial, and the behavioural. The participant describes these as the *'human ways of living'*. This participant

contends that if they walk into a school representing a Trust, they ask how do you know this is a Catholic school first and foremost? *'How do you know this is a Gospel school? Crucifix on the wall?'* or *'is it how the secretary greets you?'*

P17 points out that it is important that students and staff identify with the Trust's ethos. This participant emphasises that the founding intentions of their order placed an importance on working with the disadvantaged as being part of their spirit and mission. *'It is important that there is an element of identification by schools and by the students with this ethos.'* P19 shares that in the educational enterprise *'the Trust body has a very clear role to play'* in the engagement with schools to promote the '*Trust's ethos'*.

The next theme to emerge from the research relates to the statutory role of the board of management in upholding each school's ethos. P03 discusses what a Trust may do in the event that they have concerns about the board of management not upholding the ethos: *'you would have the right to call in your Trustee nominees'* and *'even talk to your board of management'*. P05 concludes that the Trust's Charter is *'a distillation of the charisms of the founding congregations'*. In particular, *'It's the charter, more than anything else'* that is presented by the Trust to schools. P05 states that each school is encouraged to live out its own founding intention and *'It's really becoming a lived document in the schools.'* P05 highlights the Trust's role with respect to the responsibilities under canon law, the Education Act and the *Manuel for Boards of Management.* According to P05, the congregation was founded for a specific purpose, which is expressed in the charter and from which it *'derives the ethos'*. P08 notes, *'the Education Act is strong about what the role of the board is – and what the role of a Patron is'*.

The importance of Trusts having Public Juridic Person (PJP) status also emerged from the data. Participants are not referred to by their code in order to further protect their anonymity. A participant states that their Trust is a legally established and is a PJP in the context of the Church and this participant notes that the Trust is '*on a par with the parish*' and must report '*once a year to the conference of bishops*'. A second participant highlights the need for their Trust to have a PJP status to reflect '*the kind of protections under the 1998 Education Act, relating to characteristic spirit*'. A further participant asserts that the Trust has '*responsibilities under canon law'* as well as under the Education Act. Another participant references a PJP's responsibility in reporting to the Irish Episcopal Conference and observes '*you just can't but the name over the door*' and '*you must be answerable to somebody*'. A further participant states Vatican II resulted in a change in canon law to allow lay persons to be designated as PJPs. Accordingly, the bishops '*should be interested in is the level of Catholicity*' in the Trusts.

4.11. Finding I: No consensus exists on whether a single Trust for Catholic education is a viable option. The funding of Trusts remains a challenge.

The next theme emerging from the research data is the potential for a single Trust for all Catholic schools in Ireland. Ninety-five per cent (95%) of participants responded to this question. It is clear from the data that a consensus does not exist on the option of a single Trust for Catholic education.

The effort invested in establishing the current Trusts is referenced when participants discuss the concept of a single Catholic Trust for education. Reference is made to the process in the early 2000s when a single Trust was a possibility. P01 states, *'We invited every Catholic religious congregation in the country who are Trustees of schools to join us in coming together to form a single Trust at that time.'* There is agreement

amongst the participants that serious consideration was given at the time to the structure of a single Catholic Trust body. *'There was discussion about an overall Catholic voluntary Trust. I think, for some people, that would have been the ideal'* (P02). A further participant describes the possibility of a single Trust at the time as *'people's dream'* (P03). Finding F refers to the tensions that existed two decades ago when Trusts were being set up.

Asked as to the reasons why a single Trust for Catholic education did not materialise at that time, participants put forward several. One was that smaller religious congregations feared the potential dominance the larger religious congregations would have exercised. P02 explains, *'Others would have felt that in such a Trust that the large orders would have been very strong, and that it would have been harder to get your voice heard.'* A further explanation offered refers to the number of schools that would have been included in the Trust. *'They felt that there's no point in having maybe five hundred or six hundred schools because any particular Trust couldn't manage that number of schools'* (P04).

Turning now to the potential for a single Trust for Catholic education emerging over the coming decade, no clear agreement exists that this may happen. The reasons explaining why this did not happen in the 2000s remain valid today. Referencing the establishment of Trusts 20 years ago, P14 says *'back in 2000, we didn't trust each other.'*

Offering a voice in favour of a single Trust, participants raise the issue of how a single Trust body would be a unified voice and offer advocacy for the Catholic education sector. P07 says a single Trust *'would help because the Catholic education sector is getting smaller and more insignificant, and the tide is against us.'* P03 concurs that *'a*

unified voice will help, as keeping the heart of the matter on the agenda is very important.' The number of diverse voices within Catholic education is a further theme emerging from the data. In particular, the Department of Education's wish for a single voice is referenced by P04 who states, *'The government is not going to listen to ten different voices.'* P06 agrees that *'A single Trust for Catholic schools, that would suit the Department* [of Education] *because they're finding it very hard to deal with the Catholic sector because they have so many bodies to deal with.'* P14 adds, *'because even at present, the Department of Education is driven demented dealing with different groups and different people, and all they want is to deal with a single voice for Catholic education.'* P13 relates, *'I know the Department of Education certainly would probably favour having one body to work with.'* P17 echoes, *'I suppose, what is being said is that the Department of Education don't want to speak to individual Trusts, they want one body. And that's understandable.'*

Those in favour of a unified voice in Catholic education highlight that work has been done in Trusts relating to the emergence of a single Trust (P05). This participant contends that in order to protect Catholic ethos in the Catholic education sector, good structures must be in place.

A further theme emerging from interviews is the role of a Trust in the promotion of Catholic education, in particular the need for the Catholic education sector to have a voice within public discourse. As expressed by P07, who says the Trusts are not in the public arena enough, *'They're not shouting the same way as maybe a school principal would, about safeguarding the identity of the school in the public arena.'*

Some participants advocating for a single Trust concede that such a structure might be some years away. P10 comments that they have *'heard time and time again about the*

Trusts coming together'. This participant concedes, *'we will still be talking about that in thirty years' time.'* P09 states, *'I think there is a place for each one of us to try to keep our own identity and charism alive but maybe to have it more centralised and have more unity.'*

When asked if they thought a single Trust structure would emerge, P14 says, *'We all can see that in the future, there will be a single Trust.'* P11 adds, *'Yes, I do. There are structures now being formed.'* P19 expresses the view, *'I suppose it is only a matter of time. It might be ten years down the road where the Trust would have capacity.'*

Furthermore, P12 states, *'there will be a consolidation of the Trusts, and quickly.'* P12 continues, *'I'm not sure it's in keeping with the founding vision of the orders to be resolutely holding on to something for the sake of it.'* This participant states that the *'men and women'* who founded the religious congregations were not *'empire builders'* and that the ultimate success is the handing over to lay people.

Other participants present a counterargument for a single Trust for Catholic education. When asked if a single unified Trust structure will emerge, P13 replies, *'The short answer is no. I think, we're in a very interesting time at the moment.'* This participant asserts that the concept of Catholic education means *'different things to different people. You could lose sight of Gospel values and particular charisms.'* P07 concurs: *'It would dilute the founding intention.'* P17 agrees. *'My own view is that this is not inevitable.'* P18 adds, *'I think each of the bodies seem to be happy to be on their own doing their own thing.'* P07 questions whether *'All the church should come together'*. P07 states that this idea *'has been thrown about for the last ten years'*. P08 concludes: *'a single Trust? that's easier said than done'*.

The ultimate theme addressed in this section is how Catholic Trusts can be funded in the future. Fifty-three per cent (53%) of participants refer to the funding of the Trusts as a challenge going forward. The continuation of Catholic Trusts is dependent on these Trusts being financially sustainable. It is noteworthy that Trusts do not receive funding from the State.

When Trusts were established from the late 1990s, they were funded by a financial contribution from the relevant religious congregations. P04 states, *'the religious congregations provided a lot of the funding; they are not there anymore'.* Furthermore, P10 says, *'I know the congregation put in a large amount of money for the foundation of the Trust. This is now being used to pay people.'* The aim of Trusts becoming *'self-funding'* is raised by P09 who recalls, *'The congregation would have given money to the Trust at the beginning, the idea was that the trust would be self-funding after that.'* P04 shares, *'the congregation handed over big sums of money to set up the Trusts.'* The initial investment made by the religious congregations is also referred to by P14, who articulates that the congregations *'put large amounts of money into the Trusts so that the Trusts could work off the profits of that every year'.* This participant asserts that the congregations were *'told at the time'* that it would be a once-off donation. The importance of the initial capital investment being held as an asset and the interest used to fund current operating expenditure was emphasised by this participant, *'because once it started raining, it would be very hard because the congregations just would not have the money'.*

Several of the participants spoke about the challenge that the funding of Trusts into the future will pose. This is articulated by P18, who states, *'finance is going to be an issue going forward. How long can all of these individual Trusts survive individually?'* P09 comments that Trusts could not *'rely on big contributions from schools to keep*

the Trust going', stating the Trusts will have to look at other ways in which they can fundraise. P09 concludes that if Trusts spend fundraising, they should *'just fold up tent'*, as Trusts were established to develop *'ethos initiatives in our schools'*. It is apparent from the data that religious congregations are not able to provide financial support to the Trusts going forward. P14 articulates the onus on the Trusts when they state, *'The Trust themselves are going to have to work that one out'*. P14 concludes by stating, *'I do not think that is something the congregation will have to take on board.'*

Continuing with the participants' views that funding will continue to be a challenge, P10 notes that they *'worry that the lack of finance could seriously reduce the capacity of the Trust to deliver what it's supposed to do'*. This theme is continued by P04, who refers to the *'uphill struggle'* relating to the properties transferred to the Trust. *'Some of those properties are difficult to sell because a lot were attached to convents, and they're going down in value.'* One of the participants describes the ownership of property as *'a liability'* (P14). P15 agrees that *'property is a big challenge'*.

The operational capacity of the Trusts into the future is raised by P08, who says Trusts *'could continue to operate by not having anyone on the road, visiting schools and promoting the ethos'*. This participant questions the value of Trusts if the capacity to work with schools in areas such as ethos development is not possible owing to financial constraints. Regarding the building of new schools, P04 refers to how, previously, the religious congregation would provide *'a certain amount of money'* for a *'prayer room'* or another ethos-related item. This participant continues by adding that such funding *'would not be provided by the government'*. P06 refers to the possible difference in the approaches taken by religious personnel and laity: *'financing would be a bigger worry to lay people than it was to the religious'*, as religious personnel *'would think that no matter how expensive the model would be, that*

somehow, we'd come up with the money', adding that laity *'would be very careful about the economics of it'*.

4.12. Summary of Thematic Analysis Findings

Findings from this study indicate that Catholic Trust bodies for education were established to protect Catholic education in Ireland into the future. The founding intentions of the religious congregations were an important part of why Trusts were established. There is evidence in the findings that the discernment processes entered into by the congregations brought about a new clarity to their founding intentions. In particular, the findings reveal that congregations recognised that similarities with fellow congregations were based on Gospel values. The founding charisms of the religious congregations who set up the Catholic education Trusts are still relevant. The relationship between Trusts and their schools has progressed, moving from a stance of suspicion and tension to one of confidence and hope in the future. However, the findings also reveal that the operations of Trusts have progressed to a space where partnership and shared mission are to the fore. It is of note that the statutory role of schools' boards of management in upholding their schools' characteristic spirit is mainly absent from the data. Furthermore, the findings reveal that no consensus exists amongst the interview participants regarding the future direction of Catholic Trust bodies in Ireland. Finally, the funding of Trusts has emerged as an area that will continue to be challenging for the Catholic education sector.

Finding		Alignment with the Researcher's Conceptual Framework (Section 3.2)
A	Catholic Trusts were established to protect the continuation of Catholic education.	Pierre Bourdieu (1986) discusses how the re-legitimisation of power is influenced by agency. Bourdieu (1986) posits that a 'field' such as education, engenders a specific complex of social relations that will result in a system of disposition. The establishment of the Trusts by the religious congregations represents a re-legitimisation of their founding charisms. Grace (2002) explores the concept of religious capital where a strict boundary existed between religious and laity. Vatican II mandated the religious congregations to explore such boundaries and to involve laity in the leadership structures in their schools. Lydon (2011, p. 132) states 'The concept of habitus is linked immediately with that of school culture since the latter derives from the collective contributions of members of a particular school community' Grace argues cogently that spiritual capital is derived from the past school leaders and teachers 'who have immersed in the habitus of the depth structures of the Catholic school system, particularly that found within schools sponsored by religious orders' (Lydon, 2011, p. 134).
B	Catholic Trusts were established to protect the individual religious orders' unique heritage and founding intention.	
C	Catholic Trusts were established as a response to change.	
D	Discernment brought new clarity.	Grace (2010) defines spiritual capital as 'a form of spirituality in which the whole of the human life is viewed in terms of a conscious relationship with God, in Jesus Christ and the saints, through the indwelling of the Spirit' (p. 125).
E	Trusts see Catholic Gospel values as an integral part of their mission.	Lydon (2011) contends that in The Forms of Capital (1997), Bourdieu argues for an inclusive rather than a reductionist view of capital, where the definition of the concept is 'a reality broader than a reserve of wealth or property owned' (2011, p. 129). Furthermore Lydon (2011, p. 133) refers to Gerald Grace's drawing on the term habitus when Lydon writes 'Grace draws on Bourdieu's use of the term habitus by which he means a lasting, general

		and adaptable way of thinking and acting in conformity to a systematic worldview'.
F	During the establishment of Trusts two decades ago, competition and tension existed.	Grace (2002) references Bourdieu's concepts of 'field', 'habitus', and 'symbolic power' by explaining that for Bourdieu a field is a social and cultural space characterised by particular activities, which, although they 'may enjoy partial autonomy', are internally marked by the struggles and conflicts about what must be transformed or conserved (p. 26). Grace (2002) refers to the exercise of power and the class structure within a society. The progression from a stance of suspicion and tension to a renewed hope represents a movement within the concept of 'field' and 'habitus'. Bourdieu sees power as culturally and symbolically created and constantly re-legitimised through an interplay of agency and structure (Wacquant, 2005). The protection of the Trusts' founding intentions demonstrates a form of power interplayed through the structure of the Trusts.
G	Partnership and a unified mission.	
H	Participants view the protection of founding charisms as an integral part of the role of a Trust.	
I	No consensus exists on whether a single Trust for Catholic education is a viable option. The funding of Trusts remains a challenge.	Byrne and Devine (2018, p. 463) discuss how practices in education, observing that Bourdieu's concept of habitus was particularly useful in noting that 'a collective habitus' exists where members of a group judge and act in particular contexts in ways that are mutually understood.

Table 9 List of Findings

A discussion of these findings is presented in Chapter Five.

Chapter 5: Discussion

5.1. Introduction

This chapter presents a discussion of the main findings from this research project. The research utilised documentary analysis and semi-structured interviews. The interview phase of the research involved interviews with religious personnel and laity who have been deeply involved in the setting up of Catholic Trust bodies for education. All the interview participants were knowledgeable, articulate, and generous with their time and expertise. All the participants are passionate about education. A majority of participants cited Catholic education's important contribution to the Irish education landscape. The following extract from Flannery reflects the participants' insights and motivations:

> We work with the conviction that lived well, faithfully and with a generosity of spirit, the Catholic faith tradition provides vital responses to the deepest questions and desires of the human heart. The Catholic school, seen as the locus of an existential dialogue, can be the place where the individual finds the space to grow, learns to have tolerance for the 'other' and is brought into a prayerful and reflective relationship with their God. (Flannery, 2019, p. 54)

As outlined earlier in this thesis, there is a dearth of recent relevant research pertaining to the role of founding charisms in lay Trust bodies for Catholic secondary schools in Ireland. The research lacuna emerged from an investigation of the literature. In some small way, the researcher hopes to contribute to the knowledge base that is Catholic education in Ireland. The key findings of this research were outlined in chapter four. Before discussing the significance of these findings, it is helpful to summarise their key implications.

5.2. Findings A–C

5.2.1. Overview

Findings A–C outlined how Catholic Trusts were established to protect the individual founding charisms of the religious congregations and safeguard the continuation of Catholic education in Ireland. Furthermore, the decline in new vocations joining these religious congregations had definite implications on how religious orders governed the schools that they owned. Vatican II heralded change and opportunities for lay leadership within Catholic education. These three findings present an interesting response to the research topic: the role of founding charisms in lay Trust bodies for Catholic secondary schools in the Republic of Ireland. This section of the chapter will discuss findings A–C in light of the literature highlighted in chapters one and two. Then the relevance of these findings to the literature will be explained.

5.2.2. Discussion

5.2.2.1. Neither 'Christian Generic' nor 'Catholic Specific'

The influential position exercised by the Catholic Church in the Irish secondary school system is outlined in chapter one (Randles, 1975; O'Connor, 1986; Doyle, 2000; Coolahan, 2006; Cunningham, 2009; Tuohy, 2013a). The research highlights how the interview participants value the presence of Catholic education in Ireland. It is evident from the findings that a strong and viable option of Catholic schooling is indeed a priority.

In chapter two, reference is made to Tuohy (2001, p. 376), who refers to the establishment of a Trust body and says it 'presents a major paradigm shift for the future of Catholic education in this country'. What Tuohy means is that it may lead to a more generic Catholic ethos rather than an ethos reflected in the witness of an individual

religious congregation. Tuohy did not present this move as a negative, and this is reflected in the findings.

Furthermore, of note is the research conducted by the Catholic Education Partnership (Genesis, 2021) 'Articulating a New Positioning for Catholic Education in Ireland', where the research asked if Catholic schools would become more universalistic and potentially 'Christian generic', basing their ethos in a relatively bland language, or if they would become more 'Catholic specific', putting greater emphasis on Catholic practices. The research data for this project indicates that the 'Christian generic' model is not the desired mission of the Trust bodies. Furthermore, Trusts were set up to protect Catholic education in Ireland and to protect against a drift toward a more 'generic Christian ethos'.

Chapter three outlines the theory of an 'old style' confessional school identity that is continued out of habit from a 'desire to remain recognisably "Catholic", as an expression of a passive, awaiting attitude, or also just to not to have to deal with it' (Pollefeyt and Bouwens, 2010, p. 200). The findings from this thesis indicate that this is not the position of Catholic education Trusts in Ireland. The findings present a sector that is progressive and responsive to change. None of the interview participants expressed a desire for Catholic schools to become 'Catholic specific'. The overwhelming response from participants is a conviction that Catholic schools remain welcoming and open to families of different faiths. The researcher recalls (as mentioned in chapter four) one interview participant who was enlivened when describing how, when visiting a school, Muslim students were allowed practise their faith during the school day. For this person, this act was the epitome of the openness of a Catholic school. It is evident from this research that Catholic education in Ireland is not positioned as being 'Christian generic' or 'Catholic specific'. It is possible that

an 'emerging consensus' that is progressive, confident, and true to Gospel values has indeed emerged in the Irish context.

5.2.2.2. A Mission to Serve

The findings refer to the importance placed by participants on the social justice element of the religious orders' founding intentions. This finding is consistent with the research conducted on behalf of the Catholic Education Partnership (Genesis, 2021), in particular, the perceived need to help bridge a gap between moral and social conscience development and faith formation. A worldview that Catholic education should promote a social justice mandate is consistent with the charters of the Trust bodies, Vatican teachings (see McKinney, 2018), and the principles of Christian humanism (Sullivan, 2021). Participants note the alignment of the Catholic stance of 'option for the poor' with the founding charisms of the order they knew. The documentary analysis phase of the research concurs with this finding that this philosophical stance of Catholic education was a priority. One participant asked how a Catholic school is distinguishable from a school that is multi-denominational or non-denominational. Of note is the 'option for the poor' mandate derived from the Catholic schools' founding intentions. This mandate gives Catholic Trust bodies a distinct mission based on their founding charisms and the heritage they have been entrusted to keep alive. A noteworthy contribution from P19 refers to how school principals were originally suggested as possible Trust directors. This, according to P19, would have been *'profound'* on the basis that the people responsible for the implementation of a founding charism within a school would have had a direct input into the Trusts' direction. The involvement of principals as Trust directors would represent a significant statement of intent from Trusts regarding their 'mission to serve' mandate.

5.2.2.3. Move to a Common Ground

To begin with, the findings suggest that Trust bodies for Catholic education have evolved. It is apparent from the findings that importance is now placed on the significance of Catholic education, as well as on the individual founding charisms of the Trusts' respective congregations. It is noteworthy that Catholic Trust bodies appear to be moving to a common ground in this regard. The researcher was surprised by the passion displayed by the participants when they responded to this question. The participants' views are in tandem with the literature such as Gleeson and O'Flaherty (2016), where the authors posit that Catholic Trusts in Ireland focus on Gospel values rather than on founding charisms. As previously indicated, this was not always the case. One of the reasons why Trust bodies were established was to protect the congregation's unique founding charisms, as outlined in chapter four. This finding seems to reflect the tension that existed at this time. As stated by the Catholic Schools Partnership (2015), 'voluntary secondary schools cannot presume that the founding intention will be legitimate for ever and ever'. The mission is a living and breathing reality, as expressed in the wish of the interview participants, and 'not something set in stone'. The research question assumed that religious congregations did wish for their founding charisms to form a central tenet of the Trust bodies they set up. What is not in doubt is that the motivation of congregations to set up the Trusts was to safeguard the Catholic education system in Ireland. Fifteen of the interview participants referred to the importance of the Catholic education sector having a commonality in mission. A question asked of participants was, *'Can you talk about the importance attached to the individual charisms of the order versus that of Gospel values in the Trust's documents?'* It must be acknowledged that seven of the participants did not agree with the premise of the question. Two participants objected

to the term 'versus' on the basis that if the founding charisms are 'true at all' they must be based on Gospel values. Pope Francis underlines that the Christian educator must indeed be witness to the Gospel (Mares, 2022).

5.2.2.4. Gravissimum Educationis

The document *Gravissimum Educationis* (1965a) asks how religious orders could re-evaluate the importance of their founding charisms. A key aspect of this document was the role played by the laity, as outlined in chapter two. Vatican II led to increased dialogue within religious orders (Kenny, 2004; Woulfe, 2012). As the findings show, in Ireland, this meant engaging in dialogue about the future of schools under religious order trusteeship. Other themes emerging included collaboration, the alternatives to the Trusts, and planning for the future. As one participant observed, *'why bother if founding charisms are not continued?'* The 1965 Vatican document envisaged the change that was to come. The discernment process that the religious congregations engaged in was faithful to their charisms. For Catholic religious congregations in Ireland, the spirit that flowed from *Gravissimum Educationis* resulted in the congregations re-discovering their founding intentions that reflect a contemporary landscape. Five of the interview participants referred to the spirit that flowed from *Gravissimum Educationis.*

5.2.2.5. Continuation of Legal and Moral Obligation

The findings align with the understanding offered by McCormack (1998) and Griffin (2019), who both discuss the important obligation that religious orders have in the continuation of Catholic education. Furthermore, the finding seems to be a reflection of the discourse offered by Hogan (1984), who puts forward the argument that authorities of the school or educational system view themselves mainly as custodians of a set of standards, which are to be preserved, defended, and transmitted through the

agency of schools and colleges. With this in mind, and given the opinions expressed by interview participants about the need to support the continuance of Catholic schools, it is evident that the religious orders were not willing to let their schools fall under State control. One participant remarked that the '*State will not ensure a faith-based education*'. This finding seems to reflect a desire to preserve and defend the heritage and mission that the religious orders built up over so many decades within the framework of the Catholic education sector. An analysis of the Trusts' charters concurs with this viewpoint. The principles consistent with Gospel values are very evident within these charters.

Furthermore, the individual founding intentions are acknowledged in the charters. Participants involved in the interviews agreed that the founding charisms of the individual schools should be acknowledged and celebrated locally within their respective schools. What is noteworthy is the view of the religious that they wish to pass on what has been built up. This appears to be in the knowledge that Catholic education will be safeguarded, forged, and influenced by their orders' founding intentions. It is important to acknowledge that Teresa McCormack, a Presentation Sister, was referenced by four participants. Other participants referred to the 'CORI process' that instigated the discernment process leading to the establishment of the Trusts. McCormack was the Education Officer of CORI when religious congregations were advised to start examining the potential for alternative Trust structures in Irish education. These participants acknowledged the hard work and foresight that McCormack demonstrated at that time. One participant remarked, '*what we have today, it is because of Sister Teresa McCormack's vision*'. It is of note that Trust bodies are 'seen as having significant input into shaping the ethos of a school' (Darmody and Smyth, 2013, p. 151).

5.2.2.6. A Contemporary Paradox

Religious congregations were mindful of their founding intentions when the Trusts were set up. In the case of multi-order Trusts, discernment did take time. As P08 stated, *'why bother if the founding charism is not continued in our schools?'*. Reference was made in chapter one to the differences between the approach adopted by diocesan priests in Ireland and that of congregations with a European heritage. Tuohy (2013a) describes these two approaches as having vastly different dynamics. Hence, the congregations' identity is more aligned with their founders' inspiration than a particular place. Finding B highlights that the orders' founding charisms were an essential element in the discussions leading to the establishment of Trusts. As stated, multi-order Trusts have progressed to expressing their charisms in a more connected way. This alignment is expressed in their Trusts' founding charters. The document analysis clearly identifies how the missions of Trusts are consistent with Gospel values. The Le Chéile Charter expresses the following mission:

> The [Le Chéile] Trust is an example of collaboration between Congregations. Although each Congregation professes a unique Charism, they share common ground in their understanding of the Gospel values that translate into the Ministry of Education. The Vision Statement of Le Chéile builds on that common ground. The Trust also wishes to respect and promote the unique values associated with individual Congregations. (Le Chéile, 2019, p. 9)

The challenge in maintaining the distinctive religious charisms in the 'current demographical situation of the Catholic Church' is expressed by Lydon (2009, p. 51) when he states that the literature is replete with studies focusing on the extent to which this is possible. This research highlights a contemporary paradox. The findings indicate that Trusts see the protection of their individual charisms as part of their mission. However, the findings also indicate that the Trusts in Ireland have migrated to a more 'generic' ethos based on Gospel values. One can conclude that it is indeed

possible to have a Trust structure that protects the concept of Catholic education. It is possible to acknowledge and celebrate the unique aspects of the orders' charisms within this broader structure.

5.2.2.7. A Changing Landscape

Catholic Trusts were established to protect the heritage and founding intentions of the individual religious orders, who wished to preserve what they had shaped. Findings indicate that the religious orders are comfortable with a lay Trust body continuing their mission where their individual charisms are recognised and celebrated. This research shows that the religious who established the Trusts were pragmatists and forward thinking. As explained by P10, *'Planning for that meant that they had to take action and do something.'* In particular, female religious personnel found Vatican II to be a liberating process and a break from the *'monastic'* (P01) existence they were experiencing. It is of note that all of the female religious interviewed referred to how Vatican II was liberating for them. Tuohy (2013a) discusses how Vatican II affected how religious orders questioned their existence in education. Authors such as Woulfe (2012) and Kenny (2004) outlined how Vatican II increased dialogue within religious orders. As outlined in chapter four, participants referred to how the decline in religious personnel and Vatican II meant the Church had to re-evaluate its role within Catholic schools in Ireland. The Vatican II document *Gravissimum Educationis* (Declaration on Christian Education) asserts the school's special importance regarding Catholic education. Murray (2002, p. 132) references how the Bishops of Vatican II 'desired to rekindle the spirit of the early Christian community by calling all the faithful to recognize and respond to the gifts of the Spirit within them'. Furthermore, Vatican documents such as *Lay Catholics in Schools: Witnesses to Faith* (1982) emphasise the importance of the laity in whether or not a school realises its aims and objectives. As

Woulfe (2012) puts it, the self-understanding and role of the Catholic school changed dramatically as a result of Vatican II. As the findings show, in Ireland, Vatican II resulted in religious congregations engaging in dialogue about the future of schools under their trusteeship.

5.2.2.8. Summary

Edgerton and Roberts (2014) state that Bourdieu's theory of habitus shapes the parameters of people's sense of agency and possibility. Bourdieu (1986) outlines how the re-legitimisation of power is influenced by such agency, and that a 'field' such as education, engenders a specific complex of social relations. Grace's (2002) analysis suggesting that a strict boundary existed between religious, and laity is no longer evident within an Irish context. Moreover, Lydon (2011) states that the concept of habitus is linked immediately with that of school culture. It is suggested that the continuation of the legal and moral obligation as outlined is the continuation of schools' culture and charisms within a contemporary context and within a shared 'common ground'.

5.3. Findings D and E
5.3.1. Overview

Findings D and E outlined how the interview participants deemed the discernment process entered into by religious congregations to be of benefit. In particular, participants referred to the commonality that emerged from their discussions. Again, these two findings offer a notable contribution to the research title. The processes of discernment yielded a common mission based on Gospel values.

5.3.2. Discussion
5.3.2.1. Discernment

The findings reveal that the processes of discernment entered into by the religious congregations positively impacted the orders' understanding of their founding charism. The analysis of the Trusts' charters reveals that this discernment process was consistent and loyal to their founders' original charism based on a shared fidelity to openness and gospel values. The charters reveal Trusts' who are proud of and acknowledge their heritage and traditions. However, the charters tell a story of a sector that is confident to move to a common ground where Catholic education is the priority. P01 states '*part of our motivation*' to set up the trust was the religious orders '*should be working together for the good of education rather than as individual congregations*'.

Chapter one presented a definition of discernment that emphasised that the journey taken is more important than the destination. The interview participants involved in this process emphasise how beneficial and indeed surprising the journey has been for them. Six of the interview participants referenced how they viewed their congregation's founding charisms as being particular and unique compared to other congregations prior to the process of discernment commencing. All acknowledged the discernment process as a journey of exploration and a learning moment for them.

5.3.2.2. Contemporary Structure Rooted in the Past

Finding D reveals that uncertainty prevailed when CORI instigated the process for religious orders to investigate their capacity for school governance in the late 1990s. Collins and Goan (2014, p. 9) describe how the 'Le Chéile Catholic Schools Trust was established in contemporary time, but is rooted in the past and is defining and ensuring the future of the Irish Catholic secondary school'. The origin of the Le Chéile Trust

was 12 small religious congregations (now 15). 'Underpinning this idea is a belief that the Spirit of God continues to Gift the Church in its mission of education and that this same Spirit continues to inspire those who seek the wisdom that comes from above' (Collins and Goan, 2014, p. 18). Furthermore, CEIST (Catholic Education An Irish School Trust) in its charter states that 'CEIST is committed to honouring this rich heritage, promoting inclusion, hospitality, excellence and compassion in a teaching and learning environment inspired by the Gospel and by the unique wisdom of its respective Founders' (*CEIST*, 2007). Congregations working together for a common purpose, to achieve their obligation of Catholic education, was a significant feature of the research data. The research explores the role of founding charisms in lay Trust bodies for Catholic secondary schools. The findings explain that whilst the orders' charisms were a feature of the Trusts' establishment; this space has progressed, leading to what has become a shared vision and ethos based on Gospel values, inspired by the orders' founding intentions as expressed in the Trusts' charters.

5.3.2.3. The Importance of Gospel Values

Finding F confirms that Trusts see Catholic Gospel values as an integral part of their mission. Chapter two refers to Kenny (2004, p. 406), who discusses how 'individual discernment has assumed an importance' and whether the spirituality of the Gospel and the mission of Jesus and the charisms of founders and foundresses continue to become the ground of our being for our time and our place. The findings emanating from this research answer this question. The celebration of congregations' founding intentions are within the context of a broader understanding of Catholic education. The findings present a process that took several years, and the participants painted a picture of a careful examination of what orders had in common. Reference was made to the similarities of their founders. For single-order Trusts, their establishment also included

a process that required an examination of their original mission and founding intention. For all involved, this process was indeed beneficial to their understanding of their charism and how this could be carried forward into the future.

P13 commented that the congregations had *'all worked on what they saw as the core values of their particular order. There was lots of common ground because it all comes back to the Gospel. And that was worth pursuing.'* Of interest is one dissenting voice from the research who expressed the view that little discernment took place and described the charter as follows:

> They would have put in a phrase like, 'In the spirit of the founders'. That nearly was as far as it went on charisms. Yes, they did give pen pictures of each congregation, but after that, it was, hit every note in the Catholic repertoire. (P02)

A particular feature of the findings relates to how the participants strongly expressed the view that they see little difference between their founding charisms and that of Gospel values.

Keating (2005, p. 22) refers to how the education mission of a school is informed not just by the Gospels and by the Church but also by the charism of the founding congregation. The findings presented in chapter four concur with Keating's perspective. However, the findings from this research indicate that the Gospel values have come to the fore, where founding charisms are celebrated and acknowledged, as articulated by P15, who stated, '*We're the same actually… this is about Gospel values.'* Sr Mary Reynolds (2006) expresses the view that religious congregations did not envisage the handing over of Trusteeship of schools as a 'closing down', but rather the passing on of something they have pioneered and developed. What is evident from the research is that the heritage that has been passed on has progressed and changed to meet the needs of this time and this place.

5.3.2.4. The Complexity of Establishment

The work required to set up the lay Trusts should not be underestimated. Participants strongly expressed the views that considerable legal and technical expertise were sought. Indeed, as articulated by Collins (2012), the reticence and uncertainty are evident. Whilst the 'trajectory' was obvious, the path forward was less certain. Such were the 'deep roots' as expressed by Randles (1975). As Griffin (2019) asserts, the transfer of governance from religious orders to lay Trusts represented a huge and successful initiative. Roots, by their very nature, nourish and feed. As McNamara and Norman (2010) referenced, the State ceded control and influence to the religious orders. It was indeed inevitable that the transition and move from a strong denominational position was going to take time to emerge.

5.3.2.5. Summary

Lydon's (2011) assessment referencing Grace's use of Bourdieu's theory of habitus is relevant to this research. Lydon describes how Grace's utilisation of the term habitus means a lasting, general, and adaptable way of thinking and acting in conformity to a systematic worldview. As outlined in this section, the clarity brought about by discernment and the integral role that Gospel values play in the Trusts is a representation of how the religious orders' founding charisms are lasting, however, the process of discernment brought about a new adaptability and acting within such a worldview.

5.4. Findings F–H
5.4.1. Overview

This section of the chapter discusses findings F, G, & H. These findings show that as time has progressed the Trusts' operations have become embedded and normalised. It is evident that relations with schools have developed a sense of partnership and a

unified mission. Finding F relates to when Trusts were established; there is evidence that competition, suspicion, and tension existed. Furthermore, participants perceive Trusts' role in the protection of their founding intentions as being paramount. A surprising element of the research relates to how little mention there is of the legal obligation of school boards of management to protect a school's ethos.

5.4.2. Discussion
5.4.2.1. Suspicion and Tension

Finding F refers to when Trusts were established from the late 1990s. There is evidence that competition and tension existed. Competition occurred between schools belonging to different congregations operating in the same geographical area. Tension and suspicions existed when the religious congregations announced their intentions to set up lay Trusts. CORI commenced a process to encourage religious congregations to examine how their schools could be governed into the future. Several participants recall how the larger religious congregations decided they were setting up Trusts, either as multi-order Trusts or single-order Trusts. Participants give an interesting insight into how school staff felt about the then impending governance structures coming down the tracks. Griffin (2019, p. 57) cites a member of a religious order stating that it was '[o]ne of the most critical pieces of history in Ireland in relation to the Catholic secondary school'; they also represented 'a leap of faith'. Furthermore, Griffin (2019, p. 57) reports a principal observing that '[t]he Trust was an untried, untested entity and there was a lack of confidence in it'. This leap of faith is represented in the participants' interview responses. P04 comments that competition between schools *'wasn't healthy'*. This attitude that prevailed was prior to the establishment of the Trusts. The findings from this research indicate that a spirit of partnership has emerged between the Trusts and the schools. Two of the participants

were principals when the Trusts were being proposed. These participants later became involved in the Trusts. Both of these participants spoke eloquently about the uncertainties that prevailed at the time. The staff in their schools were worried about the schools' founding intentions. Another participant spoke about schools' concerns that neighbouring schools may get access to their financial accounts. The 'leap of faith' referenced is an apt descriptor for the Catholic education sector that had so many reservations. It is significant the Trusts have progressed to a stance of partnership.

5.4.2.2. A Spirit of Partnership

Finding G refers to how the operations of the Trust bodies have become normalised in their interaction with schools over time. This is indeed significant. It is evident in the findings that Trusts perceive their entire raison d'être as interacting with their schools. P10 referred to how Trusts are not seen as being *'abstract'*. Barry (2015) refers to Archbishop Martin's call to renew the challenge for all Catholic schools to give each student the skills of faith reflection so that they can dialogue with the realities they face in today's world. The spirit of partnership between the Trust and their schools is of fundamental importance. A practical and realistic partnership with the schools is vital for a Trust to achieve its goals and live out its mission. For the charters to be lived out, the schools must implement them. The statutory duties of a school's board of management have been outlined. Finding H discusses how Trusts view the protection of their charisms as an integral part of their operations. However, the lack of reference by participants to the legal obligation of schools' boards of management to uphold their characteristic spirit is significant. A further finding of note is the importance Trusts place on training and development offered to school staff. This was seen as a significant mechanism with which to relate to staff and communicate the Trusts' charisms and values. Participants expressed the view that it is critical that this mission

is built into the relationship. Significantly, research conducted by Darmody and Smyth (2013) concluded that principals in voluntary secondary schools describe boards of management as having control over property and finance, 'whereas these areas are entirely the domain of the Trustees' (p. 151). A spirit of partnership between the Trust and a school is important. The spirit of this partnership is derived from the Trusts' charters. Equally, this spirit of partnership extends to the relationship between the Trust and a school's board of management. This partnership is also derived from the Education Act, 1998. It is important that boards of management are aware of their responsibilities pertaining to the upholding of schools' characteristic spirit.

5.4.2.3. Moving from Rhetoric to Reality

P07 described the experience of moving from a position in a Trust office to a position in a school as *'making that move from the rhetoric to the reality'*. In particular, the relationships between Trust offices and schools have progressed. It is evident that there was uncertainty about what would emerge from the processes of discernment that led to the formation of the Trusts. Seven of the interview participants were principals when the Trusts were established, and all have moved to other positions within the Trust structure. All seven of these participants referred to the feeling of uncertainty at this time. Furthermore, six participants referenced the lack of clarity concerning the Trust's role and how the Trusts interacted with their schools. The findings indicate that this position has changed. There is now greater clarity surrounding the role of a Trust body and how this role aligns with the Education Act 1998 and the *Manual for Boards of Management* (2021).

Findings F–H present an interesting snapshot of how the operations of Trusts have adapted over the past decade. Chapter two outlined how uncertainty prevailed at the time of the Trusts' establishment. Lydon (2009) explores the term charism and posits

that charism is the realisation in practice of grace, a gift enabling the believer to contribute to the common good. This is the common good, as expressed by the interview participants. These findings are consistent with the Trusts' charters. Significantly, Trusts have moved from a position of suspicion and tension to one of confidence and hope: from darkness into light.

Earlier in this chapter, the researcher outlined how the findings from this research indicate that Catholic schools in Ireland are progressing with a renewed sense of hope and optimism. This confidence is guided by Gospel values and informed by the founding charisms of congregations. However, it must be stated that there was indeed a lack of reference to boards of management, particularly their role in upholding a school's characteristic spirit. Looking at the definition of ethos progressed by Norman (2003, p. 1), where ethos is defined as 'the atmosphere that emerges from the interaction of a number of aspects of school life', it is significant that the role of schools' boards were not acknowledged further by participants. Findings F and H highlight the importance of Trusts' interactions with their schools. However, the legal framework places the obligation on boards of management to uphold characteristic spirits. The Trust charters represent a new shared value system within Catholic education in Ireland.

5.4.2.4. Summary

Wacquant (2005) references how Bourdieu perceives power as being culturally and symbolically created and re-legitimised via interplay of agency. Section 5.4. references the suspicions and tensions existing when Trusts were established. Furthermore, the spirit of partnership now present is acknowledged. Trusts for Catholic schools were established for a myriad of reasons. The interplay of agency and structure, as referenced by Wacquant is evident in this research as the Trusts

(agency) were established to protect the religious orders' founding intentions and ethos (structure).

5.5. Finding I

5.5.1. Overview

This section will outline the relevance of the final finding (I) from chapter four. This finds that no consensus currently exists in participants' responses on whether a single Trust for Catholic education is a viable or indeed a desired option. Furthermore, the challenging environment relating to how the Catholic Trusts for education will be funded in future years remains a concern for the interview participants. These two findings offer an interesting response to the exploration of the role of founding charisms in lay Trust bodies for Catholic secondary schools in the Republic of Ireland. It is clear from the interview data that the continuance of a strong and viable Catholic education sector is very much the desire of the interview participants. Finding I highlight the challenges that the sector may encounter going forward. The funding of Trusts did not feature in the original draft interview questions. However, after reviewing the literature and taking account of participants' responses, it emerged as a theme worthy of exploration.

5.5.2. Discussion

5.5.2.1. The Founders Were not 'Empire Builders'

Participant 12 comments that the founders of religious congregations were not *'empire builders'*, adding that the ultimate success of the congregations with a charism to be involved in education is the handing over to laity. Reynolds (2006, p. 60) refers to the establishment of Trusts not as a 'closing down' but rather as the 'passing on of something that they have pioneered and developed'. Finding I raises the question as to whether this passing on to laity involves a single Trust advocating for Catholic

education via a unified voice or a multi-Trust structure. Chapter four refers to the advantages and disadvantages that participants progressed for the option of such a single Trust. Research participants referenced the period in which Trusts were established, when the option of a single Catholic Trust was explored. It is evident from the findings that participants believe the Department of Education would prefer a single Trust – a single voice, as it were, with which to meet and negotiate. Another factor worthy of mention is that a single Catholic Trust would be too unwieldy and have responsibility for far too many schools. Whilst the reconfiguring of Trusts to form a single Trust might create a unified voice to represent the Catholic education sector, a single Trust would potentially have 340 secondary schools to govern. In such a structure, one may surmise that congregations' founding intentions would become less of a priority. In such a scenario, a Trust's main concern might concentrate on such governance responsibilities as making appointments to boards of management, the appointment of principals and deputy principals, and financial governance in accordance with the *Manual for Boards of Management* (2021).

Participant 19 states that it might be *'ten years down the road where the Trust would have capacity'* when referencing the establishment of a single Trust. The suspicions and tensions which existed when the current Trusts were established have been explored. The common ground emerging from the lay Trust bodies may well be the seed planted by the religious congregations, leading to stronger unity and a contemporary version of 'deep roots' (Randles, 1975, p. 18) within the Catholic education sector in Ireland.

5.5.2.2. The Funding of Trusts Remains a Challenge

The funding of Trusts also emerges from the research data as a theme. It is evident from participants' responses that the future funding of these Trusts remains a concern.

Participants refer to the financial investment committed by the religious congregations when the Trusts were set up. It is clear that congregations will not invest additional money; as was stated, it *'is assumed the Trusts would become self-funding'*. Chapter one cited research conducted by Darmody and Smyth (2013), who contend that funding of Catholic Trust bodies would remain a challenge for the Catholic schools sector. The 2015 document produced by the Catholic Schools Partnership (now the Catholic Education Partnership), the Association of Catholic Schools, and the Association of Management of Catholic Schools (AMCSS) titled *Catholic Education at Second Level in the Republic of Ireland: Looking to the Future* (2015, p. 39) observes that:

> the funding of the trustee/Patron function is a particular difficulty for the voluntary sector. Trustees of schools have duties which are identified in the Education Act. The trustees of any school promote and protect its ethos and philosophy. They are involved in appointing the board of management, in supporting building projects, in financial controls, in developing policies (e.g., the admissions Policy), and in providing advice and supports to schools.

It is noteworthy that Darmody and Smyth (2013) and *Catholic Education at Second Level in the Republic of Ireland: Looking to the Future* (2015) both implicitly reference the difficulties in Trust funding. A further 'inequality' (Madigan, 2011, sec. 3.49) relating to the Catholic education sector is State funding of secondary schools. Madigan points out that Catholic non-fee-paying secondary schools must depend on voluntary contributions from parents to cover many of the essential services required for the efficient running of the school. Madigan (2011, sec. 3.49) calls this a 'grave injustice', given the history of voluntary secondary schools and their contribution to the building up of the Irish State.

The reliance on voluntary contributions across the Catholic education sector is again referenced by Jones (2021), when it is stated that 'Catholic secondary schools' bodies

agree, with 30% of funding at second level coming through voluntary contributions'. Jones quotes John Curtis of the JMB/AMCSS as saying 'Where there is that gap, we have to make it up.' Significantly, if Trusts are expected to be *'self-funding'* (P09) and the challenges of funding the daily operations of their schools continue to be highlighted, inevitably the issue of funding will remain a serious concern. This concern regarding funding may in time align with the view that a unitary Trust body is indeed desirable within the Catholic education sector. A single Catholic education Trust may not be desired by all; it may, however, become necessary as a result of the funding difficulties highlighted.

5.5.2.3. Summary

Section 5.5 describes how the founders of religious congregations were not 'empire builders' and how the funding of Trusts will be a challenge going forward. Table 9 references how 'a collective habitus' (Byrne & Devine, 2018, p. 463) relates to Bourdieu's concept of habitus where members of a group judge and act in particular contexts in ways which are mutually understood. Section 5.5.2.1. referred to Reynolds (2006) when she stated that the establishment of Trusts were not a 'closing down' (p. 60) but the passing on of something that has been pioneered and developed, as such, it may be concluded that a mutual understanding is present to allow a culture that was pioneered to be transferred to the agency of a Trust run by laity (from religious capital).

5.6. Conclusion

The research findings of this study offer new insight into the role of founding charisms in Trust bodies for Catholic education. Of note is the emergence of a common ground built on Gospel values. This common ground is neither Christian generic nor Catholic specific, resulting in what is described in this study as a contemporary paradox. This

allows the Trust bodies to continue the legal and moral obligation of the religious congregations who were involved in their establishment. A spirit of partnership and openness has emerged, where the founding charisms that informed the establishment of the Trusts are now the responsibility of the schools. Chapter six will discuss the conclusions that emanate from the above discussion.

Chapter 6: Conclusion

6.1. Introduction

Findings from this study indicate that Trusts for Catholic education are confident for the future of Catholic education and Trusts are more assured in dealing with their schools. Findings also show that schools are more certain in the beneficial role of the Trusts. The relationship between Trusts and schools has developed and matured; initiatives such as the annual conferences contribute to this.

A common ground has been found in the commonality of the Gospel values – they provide a unity for moving forward. However, a point of tension has emerged around the role of founding charisms. It seems that the role of these founding charisms has diminished somewhat since the establishment of the Trusts. Trusts are encouraging schools to highlight the individual charisms. It appears that founding charisms are now the business of schools.

6.2. The Search for Meaning and Language

For this researcher, the uniqueness of Catholic education is eloquently expressed by Glackin and Lydon (2018, p. 200) who state, *'you cannot give what you have not got'*. The authors note a contribution by the late Cardinal Hume, who stated: 'I do not mean that a teacher has necessarily to have found the spiritual meaning to their life, but that spiritual question must have become real for them' (1997, p. 83). Furthermore, a search for language is discussed by Archbishop Diarmuid Martin (2016) refers to Pope Francis when he states that 'Catholic schools challenges us to see our schools as communities where our young people can learn to love and to serve God with the languages of the mind, the heart and the hands'. Archbishop Martin emphasises that we ought not to concentrate all our energies on any one of these three languages.

6.3. The Courage to Act

When Catholic education Trusts were established, uncertainty and caution were the overriding sentiments. Referencing the difficulties experienced by the Catholic Church in Ireland, Tuohy (2013b, p. 115) writes that '[i]t became clear that the onus was on the Church, through the congregations, to respond to what was happening in Catholic schools, and not on the schools to adapt to the changes that beset the congregations'.

The response of the religious congregations was to enter processes of discernment with their fellow religious. This was a courageous and progressive stance. The research findings indicate that the religious orders were protective and possessive regarding their individual charisms. It is important to acknowledge the frankness and honesty of interview participants. Participants refer to how they found Vatican II to be a 'liberating' moment. So too, it transpires, was the engagement with their fellow religious. Gospel values were found to be a common thread. It is also worth stating that this process of discernment was consistent and loyal to their founding intentions. This discernment process has yielded a Trust structure that has grown in confidence and capacity to promote each founding mission and intention. Gospel values are integral to the functioning of each Trust.

6.4. Progression to a Common Ground

The research explored the role of founding charisms in lay Trust bodies for Catholic secondary schools. For the researcher, this movement to a common ground is a surprising element in the research data. The premise of the research question assumed that religious orders' founding charisms would still be an overarching factor in the operation of Trusts. Whilst acknowledged as an influence on schools' lived ethos, founding charisms inform but do not dominate the activities of Trusts. A new ethos

emerges from the charters that were forged from the different charisms of the orders. The founding intentions of the different schools are celebrated locally. Most participants now see renewal as being at the centre of the Trusts' role into the future. The congregations moved from a defensive position to one of a shared mission. Chapter five discusses what was referred to as 'a contemporary paradox', where Trusts were established to protect the congregations' founding charisms. The progression to a common ground accelerates the movement to a landscape where more general Gospel values are to the fore. Of note is the significance of the Trusts' charters. The charters acknowledge the heritage of the orders' founders and position this heritage in a contemporary setting. It must be concluded that the charters celebrate these founding charisms with the intention that they will contribute to Catholic education in a synergistic sense.

However, it is necessary to state that this common ground is not an acceptable stance for some within the Catholic education sector in Ireland. Grace (2018, pp. 127–128) explains that a challenge confronting school leadership is to maintain a necessary balance between '[r]endering to Caesar' (the State) and '[r]endering to God'. It must be concluded that there are critics who argue that Catholic education in Ireland should fight back the 'ebbing tide' (Arthur, 1996). However, the common ground of Gospel values is according to the author a worthy space for Catholic schools to occupy.

6.5. Confidence, Hope, and Partnership

The interview participants strongly expressed the opinion that the heritage of charisms is an important lens through which schools should view their lived mission. However, adherence to Catholic Gospel values is now the overarching mission of Catholic education Trusts in Ireland. The individual charisms of the religious congregations are celebrated locally within the respective schools. Many of the participants referred to

'founders' days' celebrated within schools. The research suggests that Catholic education Trusts are confident about their mission and are looking to the future with confidence and hope regarding their significant mandate. An important finding from the research is how Trusts for Catholic education have developed a partnership model with their schools. After all, schools are the vessel wherein charisms are promoted and nourished. Six participants referenced the involvement of students in their Trusts' annual conference. It was evident from interviews that the participants view student experience as a key indicator of the Trusts' ability to communicate their charisms.

The research shows that multi-order Trusts were necessary because of the small number of schools within the remit of the religious congregations that created the Trust; remaining on their own was not an option. The congregations were confronted by a stark choice: they had to join a multi-order Trust, or their charism could not be sustained. The legal and moral obligation was to continue. Collaboration and discernment emerged as an important facet, notwithstanding the uncertainty and tension.

Meehan (2012, p. 20) writes that Catholic education 'can never be reduced to a process by which the State seeks to produce good citizens, or provide productive contributors to the wealth of society'. Meehan's contribution offers significant insight into the value of Catholic education. Participants echoed this when describing the commitment of the religious orders to provide Catholic education into the future.

6.6. Recommendations and Further Research

(i)   The Catholic education sector in Ireland would benefit if further research were conducted relating to the exploration of the opinions of other stakeholders such as pupils, parents/guardians, and staff. In particular the voice of students pertaining to their understanding of the founding charisms of the religious orders who established their schools would be beneficial. As this research focused on the role of Catholic education Trusts in safeguarding the founding charisms of their schools, the opinions and insights of other stakeholders remain unclear. It may also be valuable to assess the degree to which boards of management actively explore their role in being 'accountable to the Trustee to uphold the school's ethos' in accordance with Section 15 (2) (b) of the Education Act 1998. Furthermore, the role of boards of management in assessing how their school's ethos is being lived out in their schools is worthy of exploration. As stated in section 5.4.2.2. the lack of reference by interview participants to the boards of managements' obligations as required under the 1998 Education Act is significant. The semi-structured interviews: prompt questions (appendix five) includes a question which asks '*Regarding the legal duties of the Trust – How much time is spent in the managing of assets as opposed to issues relating to the promotion of ethos*?'. The interview participants acknowledged that dealing with the 'here and now' can dominate the Trust officers' time. It would be beneficial to explore the extent to which this opinion is a factor in the operations of boards of management. Founding charisms informed and guided the establishment of the Trusts, the celebration of founding charisms is now moving to a local

level. The role of charisms has changed, but are individual schools living up to these challenges? It is suggested the JMB/AMCSS may be the appropriate organisation to fund this research owing to their position as the management body for voluntary secondary schools.

(ii) Moreover, research into the viability of a single Catholic Trust would bring clarity around the fervour for this amongst Trusts, in particular the potential for the amalgamation of Trusts owing to financial necessity. It is recommended that this research may be funded by the APTCS. It is suggested that structures adopted internationally would be appropriate models to examine as part of such research. It is acknowledged in the findings that any move towards a single Trust for Catholic education would involve significant planning and policy development, as such, it is proposed that research examining potential structures would at this stage be beneficial and timely.

(iii) A further area that is currently suitable for research relates to how an inspection framework may be introduced within the Catholic education sector. It is suggested that the inspection model currently operating in England would offer an appropriate reference in this regard. It is acknowledged that such a change may require legislative changes. The Episcopal Commission for Catholic Education in conjunction with the CEP would be apposite bodies to advance such research.

(iv) This research suggests that there is uncertainty within the Catholic school system in Ireland to the extent to which teachers in Catholic schools support and promote the founding intentions of their respective schools. It is recommended that Catholic schools in co-operation with their Trust

bodies launch a project which highlights and celebrates the founding charisms of their individual schools. Whilst the research indicates that some Trusts actively engage with their schools around 'Founders Days', it is unclear to what extent this is conducted across the Catholic education sector.

6.7. A Personal Reflection on the Doctoral Journey

The researcher engaged in the doctoral journey out of a quest for discovery and to 'dive' into the unknown. To use Huxley's title for his 1932 book, this journey has allowed the researcher to discover a *Brave New World*. The last two decades working in four Catholic secondary schools have presented the researcher with numerous questions. The commonality of these questions pertains to the heritage and legacy these schools inherited, the symbolism of the sacred, and the ordinariness of structure and rhythm. The researcher teaches in a secondary school in Dublin. This College has lived through a civil war, two world wars, and various political and economic crises. In the past year, the researcher encountered minutes from a meeting in the school that stated, *'There is danger in the boys cycling out the back gate in numbers and at full speed. It would be safer if they were made to walk with the bicycles as far as gate.'* These minutes were recorded on 24 November 1936. Significantly, if these minutes were from a meeting in 2022, they would not be considered out of the ordinary. The moral of this story? *Everything changes and everything remains the same*. The cultural legacy of schools sustains and is enriched by years of interactions. These interactions occur in a place of learning that has a shared value system influenced by the charisms of the foundress or founder. This unique identity is difficult to define but simple to see. This is the lived ethos. For the researcher, this project has been a personal journey

of discovery. To quote Cardinal Basil Hume (1997, p. 83), *'the best teachers are those who are still learning'* (Glackin and Lydon, 2018).

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Appendices

Appendix One – Consent Form

How can Catholic Trust bodies safeguard their founding charisms?

An investigation into how Catholic Trust bodies can ensure the founding intentions (charisms) of the orders within their Trusts are sustained and lived out daily within the schools under the Trusts' governance.

This research is being carried out by myself, Brendan Feehan (doctoral student in the Institute of Education, Dublin City University), under the supervision of Dr Amalee Meehan (School of Human Development) and Dr PJ Sexton (School of Policy & Practice).

The research being conducted forms part of my EdD thesis. **Ethical approval for this research project has been obtained from the Research Ethics Committee of Dublin City University.**

██████████████████████████

Participant – please complete the following (*Indicate **Yes** or **No** for each question*)

i.	I have read the Plain Language Statement (or had it read to me)	Yes/No
ii.	I understand the information provided	Yes/No
iii.	I understand the information provided in relation to data protection	Yes/No
iv.	I have had an opportunity to ask questions and discuss this study	Yes/No
v.	I have received satisfactory answers to all my questions	Yes/No
vi.	I am aware that my interview will be recorded	Yes/No
vii.	I understand that involvement in the research study is voluntary	Yes/No
viii.	I understand I may withdraw from the research at any time	Yes/No
ix.	I have read the Plain Language Statement (or had it read to me) and I understand that legal limitations may exist around the confidentiality of data	Yes/No
x.	I understand that my data will be destroyed should I withdraw consent from the research or at the end of the lifespan of the research	Yes/No

I have read and understood the information in this form. My questions and concerns have been answered by the researchers, and I have a copy of this consent form. Therefore, I consent to take part in this research project

Participants Signature:
Name in Block Capitals:

Date:

Appendix Two – DCU Ethics Research Committee

Ollscoil Chathair Bhaile Átha Cliath
Dublin City University

DCU

Mr. Brendan Feehan
School of Human Development

Dr. PJ Sexton
School of Policy & Practice

Dr. Amalee Meehan
School of Human Development

25th November 2020

REC Reference: DCUREC/2020/237

Proposal Title: How can Catholic trust bodies safeguard their founding charisms?

Applicant(s): Mr. Brendan Feehan, Dr. PJ Sexton, and Dr. Amalee Meehan

Dear Colleagues,

This research proposal qualifies under our Notification Procedure, as a low risk social research project. Therefore, the DCU Research Ethics Committee approves this project.

Materials used to recruit participants should state that ethical approval for this project has been obtained from the Dublin City University Research Ethics Committee.

Should substantial modifications to the research protocol be required at a later stage, a further amendment submission should be made to the REC.

Yours sincerely,

Geraldine Scanlon

Dr Geraldine Scanlon
Chairperson
DCU Research Ethics Committee

DCU
Research & Innovation

Appendix Three – NVivo Nodes for Thematic Analysis

Phase 1 - Familiarizing yourself with your data

Name	Files	References
AMCSS JMB	7	14
Appointment of Leaders	9	15
Board of Management	16	31
Board of Management Training	1	1
Catholic Schooling	16	45
CEIST	2	6
Charism better expressed now	6	7
Charisms	12	42
Charter	13	32
Cluster Meetings	1	2
Communication Trust and School	14	29
Competency Interviewing	2	2
Competing Intentions	1	2
Competition Between Orders	4	6
Conferences	6	6
Consideration for founding charism	0	0
CORI process	8	22
Declining Vocations	13	18
Different Provinces within Religious Orders	1	1
Difficulty to find language	5	6
Discernemt	10	15
Disillusioned	1	4
Economy of Scale & Strenght in Numbers	3	4
Education Act 1998	14	28
Enforcement	2	2
Enterprise of Education	3	10
Establishing Trust	18	84
Ethos	18	45
Faith Development Faith Based	7	20
Founders' Days in Schools	5	7
Founding Intentions	16	54
Funding of Trusts	3	3
Gospel Values V Charism	13	31
Governance	9	19
Here and Now	3	3
Hesitancy	5	8
Identification of School Trust or Order	10	18
Inspectorate	1	1
Laity	9	15
Legacy Issues	2	3
Legal and Moral Basis	3	3
Life in the Spirit	11	30
Liturgical Resources	3	4
New Schools under Catholic Trust	8	12
Opening Prayers	0	0
Original Education Offices	3	6
PJP Maynooth	5	8

○ Power of Religious in Trust	2	2
○ Property and Finance	17	48
○ Rationalisation	1	2
○ Reorganisation After Establishment	1	2
○ Resourcing of Trusts	1	1
○ Responsibility of School	3	3
○ Secularism	2	3
○ Seperate Company for Property	6	12
○ Similarities Between Orders	5	10
○ Staff Relations	5	6
○ Subsumed	1	1
○ Succession and Continuation	4	7
○ Tension Faith Development and Governance	1	7
○ Training	13	23
○ Unassigned	0	0
○ Unified Voice in Catholic Schooling Single Trust	15	23
○ Uniqueness of Catholic Schooling	1	1
○ Vatican	5	12
○ Visits to Schools by Trust	6	8

Phase 2 - Generating initial codes

⊕ Name ▲ ∞	Files	References
○ AMCSS_JMB	6	9
○ An Alternative Model_Change in direction	10	16
○ Better Expressed Now	6	6
○ Boards of Management	15	27
○ Charter	10	21
○ Common Good for Catholic Education	15	27
○ Commonality in Founding Intentions	7	11
○ CORI Process	6	9
○ Declining Vocations	10	12
○ Disillusionment and Tension	3	8
○ Education Act 1998	12	23
○ Establishment	17	61
○ Faith Development_Spiritual Leader	3	7
○ Foresight	2	2
○ Founding Intention_Charism	18	79
○ Funding	9	13
○ General Gospel Values Now	14	30
○ Governance	13	40
○ Interaction with Schools	13	19
○ International	3	3
○ Juridic Person Canon Law	5	8
○ Laity	11	15
○ Legal and Moral Obligation	2	2
○ Living out Charter and Identity	6	10
○ New Schools	4	4
○ Number of Schools in Orders' Control	4	5

	Files	References
○ Organisational Structure and Evolution of Trust	12	16
○ Power of Religious	2	4
○ Property & Finance	16	37
○ Providing Resources	1	2
○ Synergy	2	2
○ Time to Establish	1	1
○ Training and Cluster	13	23
○ Trusts are Succession to Congregations	2	3
○ Unified Voice_Single Trust	16	27
○ Vatican II	5	9
○ Vatican II Liberating	2	2
○ Visiting Schools	3	4

Phase 3 - Searching for themes

⊕ Name	Files	References
○ Establishment of Trusts	16	124
○ A Common Ground & cooperation	6	18
○ Competition, Tension and Suspicion	7	23
○ CORI Process - The unknowns & vision	9	22
⊞ ○ Governance. Property & finance	15	29
○ Legal and Moral Obligation	10	15
○ Vatican II, Laity and Declining Vocations	9	17
○ Ethos_Permeates Everything	12	20
○ Communicating the Founding Intentions	3	3
○ Ethos and the Trust	7	8
○ Negotiating the Here and Now	4	4
○ Promoting a Lived Catholic Spirit	3	5
○ Governance and The Board of Management	15	68
○ Appointments	7	13
○ Function of the Promotion of Ethos	7	9
○ Interaction_Trust and Board	11	18
○ The Education Act 1998	12	16
○ Training and Networking	9	12
○ Single Trust and A Unified Voice	14	39
○ Funding and Resourcing	5	5
○ Gospel Values_Commonality	8	9
○ Searching for Language and Identity	11	13
○ Time and Evolution_The Ground Has Settled	9	12
○ The Trusts' Charters	16	93
○ Forging a Shared Future	10	25
○ Identity and Discernment	13	37
○ Living Out the Catholic Charisms	16	24
○ Relationships with Schools	5	7

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Phase 4 - Reviewing themes

Name	Files	References
○ HOW WERE THE TRUSTS ESTABLISHED	19	223
⊞ ○ Commonality and discernment	18	81
○ Governance, property and finance	18	67
○ Suspicions and tensions	12	75
○ THE FUTURE	19	82
○ A unified voice	16	28
○ An evolving terrain	13	38
○ Funding	8	16
○ THE TRUST CHARTERS	19	238
○ Gospel values and founding charims	16	51
○ Interaction and communication with stakeholders	17	101
○ The protection and development of the ethos	18	85
○ WHY WERE THE TRUSTS ESTABLISHED	19	114
○ Continuation of legal and moral obligations	18	58
○ Education Act 1998	14	20
○ Vatican II Laity and declining vocations	15	36

Phase 5 - Defining and naming themes

Name	Files	References
○ 1 WHY WERE THE TRUSTS ESTABLISHED	19	200
○ A response to change	15	50
○ Protect the continuation of Catholic education	17	82
○ Protect the unique heritage and founding intentions of the individual religious orders	16	68
○ 2 PROCESS OF TRUST ESTABLISHMENT	19	162
○ Discernment brought a new clarity	17	76
○ When Trusts were established two decades ago, competition and tension existed	13	86
○ 3 THE TRUSTS' CHARTERS	19	187
○ Multi-order Trusts and Single-order Trusts see Catholic Gospel values as being an integral part of their mission	17	65
⊞ ○ Partnership and unified mission	14	35
○ Trusts view the protection of their founding charism(s) as an integral part of their mission	18	87
○ 4 THE FUTURE	18	79
○ No consensus exists on whether a single Trust for Catholic education is a viable option	18	79

> ### *How can Catholic Trust bodies safeguard their founding charisms?*
> An investigation into how Catholic Trust bodies can ensure the founding intentions (charisms) of the orders within their Trusts are sustained and lived out daily within the schools under the Trusts' governance.
> This research is being carried out by myself, Brendan Feehan (doctoral student in the Institute of Education, Dublin City University), under the supervision of Dr Amalee Meehan (School of Human Development) and Dr PJ Sexton (School of Policy & Practice).
> The research being conducted forms part of my EdD thesis. **Ethical approval for this research project has been obtained from the Research Ethics Committee of Dublin City University.**
>
> ███████████████████

Dear X,

My name is Brendan Feehan, and I am currently a doctoral student (EdD) in the Institute of Education, Dublin City University (DCU). As part of my doctoral studies, I am conducting research to ascertain how Catholic Trust bodies safeguard the founding charisms of the religious orders involved within their respective trusts.

My supervisors for this research project are Dr Amalee Meehan (*School of Human Development, DCU*) and Dr PJ Sexton (*School of Policy & Practice, DCU*).

The aim of this research is to gain insight and further perspective into the importance of a school's founding charism within the Catholic school system in the Republic of Ireland. In particular, the research will focus on how Trusts can ensure this rich heritage can be sustained and lived out going forward.

This research project is being conducted in two phases – **documentary analysis** and **semi-structured interviews**. I am writing to request your participation in the semi-structured interview stage of this research. Your time and participation in this research would be greatly appreciated.

Participants in the semi-structured interview phase of this research are asked to agree to participate in an interview using the Zoom.us virtual platform. It is anticipated that the interview will be approx. 40 minutes in duration. It is important to emphasise that participants are not required to answer any questions they may wish not to answer. **A list of the interview questions will be provided to participants prior to the interview**. The interview will be arranged for a day and time suitable to the participant.

About the interview
This interview will be recorded. To ensure accuracy, the transcript of this interview will be provided to you prior to any data analysis. Participants may also correct or

amend any part of their contribution. If participants do not wish to be recorded, the notes of the interview will be handwritten by myself, the interviewer.

Confidentiality

The identity of participants and the Trust or religious order they are referring to will be fully pseudonymised and the identity of participants and Trust/religious order will only be known to myself and my two supervisors. Participants' names and Trust/religious orders will not appear in the thesis or any other documents emanating from this research.

It is, however, important to outline that confidentiality of information can only be protected within the limitations of the law – i.e., it is possible for data to be subject to subpoena, freedom of information claim or mandated reporting by some professions.

The analysis and transcribing of the interview will be done by the researcher. It is anticipated that interviews will be conducted via Zoom.us.

Data Protection

The Data Controller will be Dublin City University. The Data Processor is me, Mr Brendan Feehan. The Data Protection Officer of Dublin City University is Mr Martin Ward. Mr Ward may be contacted as follows:

- data.protection@dcu.ie
- Telephone: (01) 7005118 / (01) 7008257)

The data collected during this interview process is necessary to collect the views and opinions of the participants so as to analyse the data and responses in order to answer the research question.

All participant's details will be pseudonymised by the assignment of a code. The details associated with such codes will be stored in a password protected document on a password protected computer in the home of the researcher, known only to the researcher and supervisors. It is also important to highlight that given the number of potential participants, this may have implications for your anonymity.

The opinions and comments expressed by the participants and used in the dissertation, or any associated academic papers or articles, will by anonymised.

Data will be securely stored in a password protected file in a password protected computer for the lifespan on the research. It is anticipated that the lifetime of this research is January 2021 to July 2022. At the end of the research project all data will be destroyed by the researcher, Mr Brendan Feehan. No electronic or hard copies of the data will be maintained, and all data will be fully erased.

Participants in the research have the right to lodge a complaint with the Irish Data Protection Commissioner (www.dataprotection.ie).

Should participants wish to access their own personal data, this access can be requested by contacting the Data Protection Unit of Dublin City University (.https://www.dcu.ie/ocoo/data-protection)

Your participation in the research

Participation in this research project is voluntary. ***All participants have the right to withdraw consent from the research at any stage***. Participants should contact the researcher, Mr Brendan Feehan, at the above contact details to do this. If a participant withdraws from the research, all data previously collected from the participant will be destroyed within 3 days of notice of withdrawal being received. Participants will receive written confirmation of their withdrawal from the project and confirmation that all data collected from the participant has been destroyed. The participation of the participant will cease immediately upon receipt of confirmation of request to withdraw from the research.

Your participation in this research will assist in developing this particular area of policy within the Catholic sector in the Irish education system. Upon completion of the research, all participants will be sent a copy of the research findings and recommendations.

If participants have concerns about this study and wish to contact an independent person, please contact:

The Secretary, Dublin City University Research Ethics Committee, c/o Research and Innovation Support, Dublin City University, Dublin 9. Tel 01-7008000, e-mail rec@dcu.ie

Yours sincerely,

Brendan Feehan

> ### *How can Catholic Trust bodies safeguard their founding charisms?*
>
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>
> The research being conducted forms part of my EdD thesis. **Ethical approval for this research project has been obtained from the Research Ethics Committee of Dublin City University.**
>
> ████████████████████████

Establishment of trust (if relevant)

Why in your opinion was this Trust established? Can you tell me the rationale involved in establishing this, Trust?

  I. What considerations were given to the individual order's founding charism when the Trust was being set up?
      a. Why do you think the order did not join with another Trust where there would be different religious orders involved?

Structure, Documents & Governance

  I.   What in your opinion is the role of a Trust body, specifically the role of the Trust in interacting with schools?
  II. Can you talk about the importance attached to the individual charisms of the order versus that of Gospel values in the Trust's documents?
 III. Regarding the legal duties of the Trust – How much time is spent in the managing of assets as opposed to issues relating to the promotion of ethos?

Charism & Ethos

  I.   What role do Trusts have regarding the promotion of the order's founding charism? (Statutory functions?)
  II. What more could a Trust do to promote their founding charism?
 III. Do you think the order(s) has put in place sufficient structures to maintain their founding charism(s)?