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The University of San Francisco

PERCEPTIONS OF FOUR SACRED HEART HEADS OF SCHOOL RELATIVE TO THE UTILIZATION OF THE *GOALS AND CRITERIA* AND SPECIFIC PROCESSES IN DECISION MAKING

A Dissertation Presented
to
The Faculty of the School of Education
Leadership Studies Department

In Partial Fulfillment
of the Requirements for the Degree
Doctor of Education

by
Andrea von Sternberg Shurley
San Francisco
December 2015

THE UNIVERSITY OF SAN FRANCISCO

Dissertation Abstract

Perceptions of Four Sacred Heart Heads of School Relative to the Utilization of the *Goals and Criteria* and Specific Processes in Decision Making

The Network of Sacred Heart Schools advances its education mission through a pivotal document entitled *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). The Heads of school are the leaders and key decision makers who ensure that their leadership meets the expectations articulated in the five goals and criteria and that other personnel within their schools demonstrate an understanding of these pivotal guidelines in the process of their daily work. No research exists to date regarding the extent to which the Heads of school apply the five goals and criteria during decisions critical to the school mission, and no empirical evidence regarding the manner in which these leaders render their decisions has been advanced. Consequently, this current study explored the extent to which Heads of school within the Network of Sacred Heart Schools engage with the overarching goals and criteria when rendering decisions and whether they implement a consistent process for decision making.

This study applied qualitative research methodology. After inviting 21 Heads of school within the Network of Sacred Heart Schools to participate, four agreed to volunteer for the study. Two semistructured, one-hour interviews were conducted with each participant, the first in person and the second by telephone. The data collected from these interviews suggest that these leaders apply the five goals and criteria to all aspects of their leadership including decision making. They were not applied in any predetermined systematic manner throughout the process of making decisions, although

each Head was able to identify a general system or process implemented. The findings of this study suggest that the Heads of Sacred Heart schools place appropriately high value on the five goals and criteria mandated by the Network mission because they permeate all aspects of their leadership including decision making. It was also noted that these leaders may benefit from an introduction to the current research, as it relates to methods of decision making, in order to ensure that they are aware of optimal methods.

This dissertation, written under the direction of the candidate's dissertation committee and approved by the members of the committee, has been presented to and accepted by the Faculty of the School of Education in partial fulfillment of the requirements for the degree of Doctor of Education. The content and research methodologies presented in this work represent the work of the candidate alone.

Andrea von Sternberg Shurley	November 30, 2015
Candidate	Date

Dissertation Committee

Dan McPherson, Ph.D.	November 30, 2015
Chairperson	Date
James Everitt, Ed.D.	November 30, 2015
Doreen Jones, Ed.D.	November 30, 2015

DEDICATION

I dedicate this dissertation to my loving and supportive family, especially my husband,

my children, and my parents,

to

the countless ones who have helped me understand the importance of

Catholic education,

and to

the teachers and administrators who bring their schools' missions to life every day in

Catholic schools everywhere.

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I am grateful for the work and time shared with me by my dissertation Chairperson, Dan McPherson, Ph.D., and committee members, James Everitt, Ed.D. and Doreen Jones, Ed.D. I appreciate the instructors and administrative supporters who worked with me throughout my years at the University of San Francisco. My years in this program have shown me the true gift of a loving, Catholic school community, and I would like to offer thanks in particular to Raymond Vercruysse, CFC, Ed.D., Timothy Cook, Ph.D., Gini Shimabukuro, Ed.D., Stephen Katsouros, S.J., Ed.D., and Ms. Thanh Ly. I am grateful for the open doors at many Sacred Heart schools, the kind support of Ursuline Academy of Dallas, and the commitment of the Jesuit community at University of San Francisco, who allow the Catholic Education Leadership program to thrive and flourish. I offer special thanks to the ones who walked this path before or with me and shared a kind word at just the right time, especially Michael, Lois, Eileen, and Ann.

Finally, I thank my husband for encouraging me throughout this long experience and accepting that there were times when I had to close the door and burrow into my work, and I thank my mother who made sure my little boys never felt neglected or bored while I worked. Above all I thank Knox and Gibson for simply being.

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CHAPTER I

THE RESEARCH PROBLEM

Statement of the Problem

St. Madeleine Sophie Barat founded the Society of the Sacred Heart to be consecrated to glorifying the heart of Jesus. The Network of Sacred Heart Schools (2012a) in the United States and Canada is devoted to advancing the education mission of the Society (para. 1). The Society shares in the mission of the Catholic Church "by making known the revelation of God's love whose source and symbol is for us the Heart of Christ" (Society of the Sacred Heart, 1982, para. 3). Education has been at the core of the Society of the Sacred Heart (1982) since its inception. By virtue of its charism, the Society is consecrated to glorify the heart of Jesus. The Foundress identified the education of girls as one of the four ways in which the Society was to glorify the Sacred Heart of Jesus. In addition to obedience, poverty, and chastity, the Religious of the Society make a fourth vow to educate.

The education of young people is connected to the lived mission of the Catholic Church in the following manner:

> We participate in the mission of the church through the service of education which is our way of continuing the work of Christ. This service of education and instruction is directed chiefly towards the young and those who bear within them the future of the world. (Society of the Sacred Heart, 1982, para. 7)

This mission and the charism of the Society are articulated for Sacred Heart schools in the United States within a pivotal document entitled *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), which focused on the educational aims of the Society of the Sacred Heart in the United States-Canada. The document represents an updated version of the goals and criteria a Sacred

Heart education institution is called to witness. The original vision of the Society's Foundress, St. Madeleine Sophie Barat, was used to guide the first version of *Goals and Criteria for Sacred Heart School in the United States.*

Central to realization of the charism and mission of Sacred Heart schools are the Heads of school within the Network. These administrators are called to know and enliven the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) within the institutions under their authority. As Heads, they are the chief decision makers of their schools, as well as the key figures articulating and promulgating the charism and mission of their schools to their constituents (i.e., boards, faculty, students, parents, and the community at large). As a facet of their ongoing professional development and formation in support of the mission, the Heads attend workshops hosted by the Network of Sacred Heart Schools on an annual basis.

The Society of the Sacred Heart calls upon all within its schools to embrace and facilitate the charism and mission of Sacred Heart education. At the school level, the Society requires all members to participate in a formal, self-study process to assess how well their U.S. schools are "living" the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). The Sacred Heart Commission on Goals (SHCOG) oversees these self-study processes within each school on a five-year cycle. These studies review all aspects of school life utilizing the *Goals and Criteria for Sacred Heart Schools in the United States* as an assessment tool. The results identify the success of Network schools with regard to engagement with the goals

and criteria, as well as the opportunities the related document presents for deepened connections to its precepts.

Although the Sacred Heart schools within the United States undergo regular, self-study assessments through the SHCOG, no empirical research exists to date regarding the extent to which the Heads of Sacred Heart schools utilize *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) for decisions critical to the school mission. No empirical evidence regarding the manner in which these leaders render their decisions has been advanced. Consequently, this study was conducted to explore the extent to which Heads within the Network of Sacred Heart Schools engage with *Goals and Criteria for Sacred Heart Schools in the United States* when rendering decisions and whether they utilize a consistent process for decision making.

Background and Need

In 1800, at the age of 21, St. Madeleine Sophie Barat founded the Society of the Sacred Heart within Paris, France to make known the love of the heart of Christ. The Society expanded around the globe during Barat's lifetime and continues to flourish (Kilroy, 2000). In 1918, St. Rose Philippine Duchesne arrived in St. Charles, Missouri, bringing the Sacred Heart mission and education tradition to the United States (Mooney, 1990). Buetow (1985) described the academic contribution and sacrifices of the teaching Religious as heroic, citing Philippine Duchesne, who traveled from France to work with Indians at the age of 72 and founded the first U.S. Sacred Heart school within St. Charles, Missouri, as such a heroine. Duchesne's mission in the United States evolved to become the current Network of Sacred Heart Schools.

As of July 2015, 24 Sacred Heart schools existed within the United States-Canada Province (see Appendix A), which encompasses the Network of Sacred Heart Schools. These schools are united by the five goals and criteria for Sacred Heart schools in the United States, which were first articulated in 1975, revised in 1990, and again revised in 2005. The 2005 *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is the document currently referenced by all Network schools. Its five goals are articulated in the following manner:

> Goal I: Schools of the Sacred Heart commit themselves to educate to a personal and active faith in God.
>
> 1. Rooted in the love of Jesus Christ, the school promotes a personal relationship with God and fosters the spiritual lives of its members.
>
> 2. The school seeks to form its students in the attitudes of the heart of Jesus expressed in respect, compassion, forgiveness and generosity.
>
> 3. The entire school program explores one's relationship to God, to self, to others, and to all creation.
>
> 4. Opening themselves to the transforming power of the Spirit of God, members of the school community engage in personal and communal prayer, reflection and action.
>
> 5. The entire school program affirms that there is meaning and value in life and fosters a sense of hope in the individual and in the school community.
>
> 6. The school fosters inter-religious acceptance and dialogue by educating to an understanding of and deep respect for the religions of the world.
>
> 7. The school presents itself to the wider community as a Christ-centered institution and as an expression of the mission of the Society of the Sacred Heart.
>
> Goal II: Schools of the Sacred Heart commit themselves to educate to a deep respect for intellectual values.
>
> 1. The school develops and implements a curriculum based on the *Goals and Criteria*, educational research and ongoing evaluation.

2. The school provides a rigorous education that incorporates all forms of critical thinking and inspires a life-long love of learning.

3. The school program develops aesthetic values and the creative use of the imagination.

4. The faculty utilizes a variety of teaching and learning strategies that recognizes the individual needs of the students.

5. The school provides ongoing professional development for faculty and staff.

6. Members of the school community model and teach ethical and respectful use of technology.

Goal III: Schools of the Sacred Heart commit themselves to educate to a social awareness which impels to action.

1. The school educates to a critical consciousness that leads its total community to analyze and reflect on the values of society and to act for justice.

2. The school offers all its members opportunities for direct service and advocacy and instills a life-long commitment to service.

3. The school is linked in a reciprocal manner with ministries among people who are poor, marginalized and suffering from injustice.

4. In our multicultural world, the school prepares and inspires students to be active, informed, and responsible citizens locally, nationally, and globally.

5. The school teaches respect for creation and prepares students to be stewards of the earth's resources.

Goal IV: Schools of the Sacred Heart commit themselves to educate to the building of community as a Christian value.

1. The school implements an ongoing plan for educating both adults and students in the heritage and mission of Sacred Heart education.

2. The school promotes a safe and welcoming environment in which each person is valued, cared for and respected.

3. Adult members of the school model and teach skills needed to build community and practice clear, direct and open communication.

4. The school has programs that teach the principles of nonviolence, conflict resolution and peacemaking.

5. The school makes a deliberate effort to recruit students and employ faculty and staff of diverse races, ethnicities and backgrounds.

6. The financial aid program effectively supports socioeconomic diversity.

7. The school participates actively in the national and international networks of Sacred Heart schools.

Goal V: Schools of the Sacred Heart commit themselves to educate to personal growth in an atmosphere of wise freedom.

1. All members of the school community show respect, acceptance and concern for themselves and for others.

2. School policies and practices promote self-discipline, responsible decision-making, and accountability.

3. Students grow in self-knowledge and develop self-confidence as they learn to deal realistically with their gifts and limitations.

4. School programs provide for recognizing, nurturing and exercising leadership in its many forms.

5. The school provides opportunities for all members of the community to share their knowledge and gifts with others.

6. All members of the school community take personal responsibility for balance in their lives and for their health and well-being. (pp. 6–10)

Leaders of the 24 full-member schools within the Network of Sacred Heart Schools possess autonomy in the manner in which they manage their schools, linked by *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). This document opens with an articulation of the five foundational principles. The first was stated in the following way: "In the *Goals and Criteria,* the Society of the Sacred Heart defines the mission of the school as part of the Society's educational mission in the Catholic Church" (p. 5). The second foundational

principle clarified that "each school is accountable to the Society through the Sacred Heart Commission on Goals for adherence to the *Goals and Criteria*" (p. 5).

The third foundational principle articulated by the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) addressed the responsibilities of the board of trustees and administration of each school to "establish and uphold policies that are consistent with the *Goals and Criteria*" (p. 5). The fourth foundational principal clarifies the expectation that "the school allocates its resources to support each Goal and its Criteria" (p. 5). The fifth and final foundational principle is that the school is "in compliance with professional standards as stated by accrediting agencies" (p. 5). *Goals and Criteria for Sacred Heart Schools in the United States* provides direction for school leadership to ensure they are supporting the education mission of the Society of the Sacred Heart.

The SHCOG provides an opportunity for the Network of Sacred Heart Schools to reflect upon how they are fulfilling the mission of the Society of the Sacred Heart (Society of the Sacred Heart, U.S. Province, 2005); however, no formalized opportunities are presented for administrators to examine their decision making in support of *Goals and Criteria for Sacred Heart Schools in the United States*. The extent to which, or the manner in which, Heads of the Network engage with *Goals and Criteria for Sacred Heart Schools in the United States* when making decisions had yet to be studied. Furthermore, no information existed with regard to any consistent decision-making processes in place. The Network will benefit from this study, which sought to provide insight into how Heads of school within the Network apply *Goals and Criteria for Sacred*

Heart Schools in the United States in decision making, as well as any related consistent processes in place within their respective schools.

Conceptual Framework

The conceptual framework of this study will be based upon three interlocking concepts. The first is recognition among those within the Catholic Church of the importance of a charism to the pastoral ministry of the church, specifically in relation to Catholic education. The importance of the charism of the Society of the Sacred Heart to the mission of its schools is addressed in this study. The second concept is the importance of documenting the characteristics of a charism in order to perpetuate its principles. The articulation of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)—the charism of the Society—as it relates to Sacred Heart schools within the United States, provides that documentation. The third concept is the recognition of the Catholic Church of the mission of Catholic education as dependent primarily upon school administrators. Corollary to this is the recognition of school administrators as the authoritative decision makers of the Network of Sacred Heart Schools. This study explored the decision-making processes of the leaders of these schools.

As defined by Cook (2004), "Charisms are special gifts of the Holy Spirit that characterize an individual or group and that are used to contribute to the common good and glorify God in the, church and world" (p. 18). Williams (1978) affirmed that this was true for Barat and the Society, stating, "The Foundress . . . saw the Society of the Sacred Heart, in the divine thought, as coeval with the church, part of the same salvific plan, the same paschal mystery" (p. 15). A charism is given in order to facilitate a

specific work within the world (*Catechism,* 1994; Cook & Simonds, 2011). Guided by the work of Vatican II, Pope Paul VI (1964) affirmed that the charismatic dimension of the church was both important and necessary, and that the laity are also responsible for shepherding the faithful and recognizing the ministries and charisms present in their work with religious orders. In 1971, the Pontiff encouraged religious orders to explore their charisms, as provided by their founders, to consider their spiritual and evangelical intentions, as well as their example of sanctity.

The Catholic Church values religious charisms (Paul VI, 1971) and the schools led by these charismatic orders because the charisms infuse and are reflected in the core beliefs and values of schools sponsored by religious congregations (Cook, 2001, 2004). In 1977, the Sacred Congregation for Catholic Education (SCCE) stated,

> 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. May they be faithful to the inspiration of their founders and give their whole-hearted support to the apostolic work of education in Catholic schools. (¶ 89)

The Society of the Sacred Heart has an identifiable charism, formed, and envisioned by Barat, to permeate and define her schools. As described by Cook (2001),

> The Network of Sacred Heart Schools operate out of a set of principles that have characterized Sacred Heart education since the Society of Sacred Heart's founding by Saint Madeleine Sophie Barat. These principles include "personal and active faith in God, a deep respect for intellectual values, and personal growth in an atmosphere of wise freedom." (p. 20)

Cook (2004) asserted that the charism of a school, which informs its values and core beliefs, must be identified, nurtured, and promoted by its leaders and the entire school community, if it is to be actualized. Documenting these charisms helps school members to understand their responsibilities to their sponsoring orders. Dyer (1997)

advanced that *Goals and Criteria for Sacred Heart Schools in the United States* gave expression to the charism of the Society of the Sacred Heart. The document identified and documented the charism of the Society, as it specifically applied to the Network of Sacred Heart Schools within the United States. *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) provided the written framework by which all assessments, actions, and decisions on behalf of the schools were to be measured.

The Catholic Church has repeatedly declared the importance of its schools and those who lead and teach within the institutions. In his landmark encyclical on Christian Education, Pope Pius XI (1929) declared that Catholic education does not exist outside the church; it exists *for* the church. He asserted that the individuals leading and educating youth attending Catholic schools are responsible for establishing the "perfect" Catholic school, and that these individuals are expected to be knowledgeable in their respective areas of expertise. However, they are also to possess the "intellectual and moral qualifications required by their important office [holding a] pure and holy love for the youths confided to them, because they love Jesus Christ and His church" (¶ 88). Articulating and promulgating the teachings of Vatican II, Pope Paul VI (1965) reaffirmed the importance of Catholic schools and the people leading them, declaring, "This vocation demands special qualities of mind and heart, very careful preparation, and continuing readiness to renew and to adapt" (¶ 5).

The United States Catholic Conference Committee on Education (USCCB; 1995) asserted, "Principals are the 'master teachers' and should possess the qualifications necessary to provide professional, academic, moral, and personal leadership in the

school" (p. 755). The USCCB (2005) reiterated the importance of Catholic schools and their leadership, stating,

> All Catholics must join together in efforts to ensure that Catholic schools have administrators and teachers who are prepared to provide an exceptional educational experience for young people—one that is both truly Catholic and of the highest academic quality. (¶ 1)

Experts in Catholic education have echoed church teaching in this regard. Grace (1996) asserted that leaders within Catholic schools have a "strategic role to play in the maintenance of the distinctive character of Catholic education" (p. 70). Palestini (2004) declared, "God has blessed Catholic educational leaders with a vocation, namely, the work and ministry of perpetuating Christ's unfinished mission of building the Kingdom of God in Catholic schools" (pp. 19–20). Both scholars supported the notion that Catholic school leaders are ultimately responsible for realizing the expectations of the church and evangelizing her mission to the school community.

Leaders within Catholic schools sponsored by a religious order are charged with a dual responsibility: (a) to foster the unique charism of their religious congregation and (b) to facilitate the mission of Catholic education in general. The decisions of leaders, as well as the process by which these decisions are made, are both essential and influential to realization of the charism of Catholic schools and their education mission. According to Palestini (2004), "Decision making is a basic and important process in educational institutions. The success experienced by educational administrators depends largely on their mastery and effective implementation of the decision-making process" (p. 225). Lunenburg (2010) agreed, noting, "Decision making is one of the most important activities in which school administrators engage daily – the success of a school is critically linked to effective decisions" (p. 11).

Sacred Heart schools within the United States hold their school leaders to high standards and clearly articulate the expectation that they will support the mission and charism of the Society of the Sacred Heart. Their document, *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), articulates this expectation within its foundational principles section. Specifically, its fourth principle states this expectation in the following manner: "Each school's Board of Trustees and Administration establish and uphold policies that are consistent with the *Goals and Criteria*" (p. 5). The SHCOG process invites all school members, including leadership such as the Heads of school, to regularly reflect upon their strengths and areas for growth in relation to *Goals and Criteria for Sacred Heart Schools in the United States*. As articulated in the 2014-15 SHCOG manual, "Network Schools exercise their accountability for mission to the Provincial through the required SHCOG Process" (Society of the Sacred Heart, U.S. Province, 2014, p. 4). The head of school is ultimately responsible for school accountability to the Provincial and connection to *Goals and Criteria for Sacred Heart Schools in the United States*. Consequently, these leaders are expected to attend Sacred Heart formation workshops hosted by the Network of Sacred Heart Schools on an annual basis.

Teixeira (2012) conducted a qualitative research study in which she interviewed current leaders of Sacred Heart schools to identify key characteristics of future Sacred Heart leaders. She identified three characteristics through this study: (a) a personal and active relationship with Christ, (b) a dedication to *Goals and Criteria for Sacred Heart Schools in the United States,* and (c) acknowledge of the history and philosophy of the

Society of the Sacred Heart. Teixeira's study design reflected these characteristics in its focus on Heads of school.

Three concepts comprised the conceptual framework of this research study: (a) the importance of charism, including that of the Society, as recognized by the Catholic Church; (b) the importance of a documented charism, as exemplified by *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005); and (c) the importance of leadership and administration in Catholic schools, especially relative to their role and responsibility as decision makers.

Purpose of the Study

The purpose of this study was to discover, through face-to-face interviews and follow-up telephone interviews, the extent to which Heads of Sacred Heart schools within the United States apply the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions within their respective schools. The particular issues involved when such decisions are made were also explored, as well as the manner in which the Heads make decisions with consideration to *Goals and Criteria for Sacred Heart Schools in the United States* (i.e., to what extent consistent procedures, checklists or templates, and other individuals are involved in decision making.

Research Questions

The following research questions guided this study:

1. How do the Heads of school within the Network of Sacred Heart Schools in the United States apply *Goals and Criteria for Sacred Heart Schools in the*

United States (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their respective schools?

2. When have the Heads of school used *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions?
3. Are all decisions made by the Heads of school handled in the same manner or are only particular types of decisions viewed as applicable to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)?
4. In what way do Heads of school render decisions affecting the Network of Sacred Heart Schools (e.g., consistent procedures, a checklist or template, and/or other individuals involved in the decision-making process)?

Significance of the Study

This study addressed the charism of the Society of the Sacred Heart, as it manifests within the Network of Sacred Heart Schools in the United States. Within the context of this charism, this study was conducted to explore how Heads of school render decisions within their respective institutions. By investigating the processes applied by Heads of school when making decisions, and by inquiring as to the extent to which they use *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when rendering these decisions, a topic with limited available information is addressed. The charism of the Religious of the Sacred Heart and the schools they sponsor within the United States is highlighted.

The data collected in this study through face-to-face interviews with Heads of school have contributed to a greater understanding of how these leaders render decisions affecting their schools. Specifically how these leaders make decisions, or the extent to which they use *Goals and Criteria for Sacred Heart Schools in the United States* in the process, had not been studied. This current research provides the first insight into these questions. Lunenburg (2010) highlighted the importance of decision making by school leaders, acknowledging that "although everyone in a school makes some decisions, school administrators are paid to make decisions. Their main responsibility lies in making decisions rather than performing routine operations" (p. 2). Consequently, it is as important in this study to focus on the Heads of school as it is on the highest level administrators.

This study will help the leadership and school administrators of the Network of Sacred Heart Schools to develop greater understanding of how Heads of school use *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions. Additionally, it may lead to a formalized template or process based on the goals and their criteria that could be utilized by all Sacred Heart schools within the United States. This study will also serve as a model for use by school administrators within other schools established by a religious order by encouraging them to reflect upon how their charism is operative within their schools when making decisions.

Definition of Terms

The following terms are used throughout the study and defined for purposes of the research:

Charisms are special gifts of the Holy Spirit that characterize an individual or group and that are used to contribute to the common good and glorify God in the church and throughout the world (Cook, 2004, 2015; Cook & Simonds, 2011).

Formation refers to the notion of formation to a mission, which according to the Network of Sacred Heart Schools (2012b), is

> an ongoing plan for the education of adults to the essential elements of the mission and traditions of the Society of the Sacred Heart. Dimensions of this formation include awakening and deepening one's personal relationship with the heart of Christ, developing these competencies in the public sphere, and empowering others to claim their own relationship with God. (para. 1)

Goals and Criteria for Sacred Heart Schools in the United States (Society of the Sacred Heart, U.S. Province, 2005) is considered "the sine qua non for every school that belongs to the Sacred Heart network" (p. 14).

Heads of school refers to leaders at the top of the organizational charts of the Network of Sacred Heart Schools who report to a board of trustees. The title varies between president, director, headmaster, or headmistress; however, the expectations of the role remain the same. The Network uses this term to refer to those filling this role, regardless of the title used at individual schools.

The *Network of Sacred Heart Schools* "provides a means for mutual support and development among the Sacred Heart schools in the United States-Canada province through [the] sharing of intellectual, spiritual and other resources in furthering the mission of the Society of the Sacred Heart" (Network of Sacred Heart Schools, 2012c, para. 1).

A *province* is how "the Society of the Sacred Heart is divided . . . each province usually comprising a country or related geographical areas" (Network of Sacred Heart Schools, 2012d, para. 1).

The *Sacred Heart Commission on Goals (SHCOG)* "facilitates a system of accountability for Network schools in their carrying out the mission of the Society of the Sacred Heart" (Network of Sacred Heart Schools, 2012e, para. 1).

CHAPTER II

REVIEW OF THE LITERATURE

Restatement of the Problem

Leaders within the Network of Sacred Heart Schools in the United States are called by the Network to live out the goals and criteria of Sacred Heart education, as they articulate the charism of the Society of the Sacred Heart and the teachings of its Foundress, St. Madeleine Sophie Barat. These goals and criteria provide an articulated framework of expectations for the Network to follow. While the Network provides an opportunity for formal reflection through the SHCOG process to ensure adherence to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) at the forefront of their operation, no study had been conducted to explore the extent to which Heads of school apply the goals and criteria as they render decisions. No study had been conducted to identify the extent to which Heads of school apply any formalized process or template when making decisions. This information was needed to provide a clearer understanding of how Heads of school make important decisions and the extent to which they use *Goals and Criteria for Sacred Heart Schools in the United States* to support those decisions.

Overview

Literature relevant to the call to mission for all Catholic schools, and the place of religious charism within that process, was reviewed for this study. The review also addressed the history and mission of the Society of the Sacred Heart and its education focus. Research on decision making with a focus on decisions within schools was reviewed. Studies conducted to investigate Catholic education found no dissertations that

specifically addressed the intersection of decision-making processes and charism-rooted organizations.

Catholic-Education Mission

All Catholic schools, by their very nature, are mission-driven institutions. Glickman and Peters (2009) noted that a core factor within a mission-driven school is that faculty members, as well as leaders and staff, view their work and their goals for students as more far reaching than state standards. Catholic-school leaders are called to be mission driven. This has been historically articulated and communicated by the Catholic Church. Pope Pius XI (1929) described the mission of Catholic education as "embrac[ing] every nation, without exception, according to the command of Christ: 'Teach ye all nations'" (¶ 25). The mission to educate, according to the Pontiff, belongs to the Catholic Church. Pope Pius XI decreed that Catholic education is rooted in community, and that the family, civil society, and the Catholic Church all play a role in the education of young people. Additionally, those delivering Catholic education are called to form a group of people who have been properly educated in the home, have a sense of a just State, and who have allowed the mission of the Catholic Church to shape their characters and lives.

Pope Pius XI (1929) expressed an expectation that parents would educate their children rigorously, morally, civically, and physically. Parents were also expected to choose Catholic education for children over public school. For Pope Pius XI, the Catholic Church is to be the guiding and maternal entity for all education, as well as a living example of Christ for students. The Pontiff asserted that good teachers are the most important element in a perfect school, and that the Catholic school exists for the

education of young people, as a defined and specific aspect of the Catholic Church. Consequently, Catholic education does not exist outside the Catholic Church; it exists *for* the Catholic Church. Christ is the preeminent example of character and the ultimate teacher.

Pope Paul VI (1965) of the Second Vatican Council articulated and clarified the mission of Catholic education as developing an atmosphere within the school community that is "animated by a spirit of liberty and charity based on the Gospel" (¶ 8). The "person" in Catholic education is a focus, and the Second Vatican Council decreed that all persons have an inalienable right to an education through which they can develop a guiding conscience, and that all Christians have the right to a Christian education. The Council also noted that Catholic schools are called to produce men and women who are able to make sound judgments based upon such a conscience and who know and love God, and that home, school, and church share in the responsibility of this formation. The Council Father declared that all Catholic educators are instructed to evangelize.

Parents, as primary educators, are to know how to best educate their children and make every effort to educate them within Catholic schools. Teachers within Catholic schools are expected to bear witness and testimony to Christ in all actions and teachings, to work in cooperation with parents, and to be adaptable and constantly educating themselves. The Catholic school, as an institution, is called to nurture intellectual faculties, develop the capacity of students for sound judgment, introduce them to cultural heritage, foster a sense of values, and prepare students for professional life. The Second Vatican Council reminded those in Catholic education that Christ is the spirit and core of Catholic education—the Teacher of teachers.

The SCCE (1977) addressed contemporary concerns and questions in a document that emphasized that Catholic schools are an integral facet of the salvific mission of the Catholic Church. As such, they are responsible for evangelization and becoming centers of human formation through the integration of faith and culture and faith and life via religious teaching and catechesis, the formation of educative Christian community, and service to the Catholic Church and society. The SCCE challenged those within Catholic schools to remember their role in service to the poor because impoverished students have the right to a Christian education. The Catholic school has the responsibility to aid each student in his or her formation and to guide every student to a knowledge of Christ. When the Catholic school realizes its mission, it produces students who are knowledgeable in their faith and prepared for life and work as Christians.

The SCCE (1977) underscored the responsibility of parents to provide Christian upbringing within the home and to support this by enrolling children within Catholic schools whenever possible and serving as active partners with these schools in the education of their children. Teachers within Catholic schools are to guide students to a deepening of faith, to share the truth of the gospels with pupils, and to be full of Christian wisdom, as well as prepared and competent in their academic subject areas. Essentially, from the perspective of the SCCE, teachers safeguard and develop the mission of the Catholic school to help form Christian character in students. It decreed that the Catholic school is a place of integral formation—a privileged place—that works closely with families, parishes, Christian communities, and youth associations. Most importantly, Catholic schools are centered in Jesus Christ, the Gospel, all other Scripture, and the teachings of Christ to sustain the spirit of the school.

The Congregation for Catholic Education (CCE; 1988) addressed local ordinaries and the superiors of religious congregations dedicated to the education of young people, as well as Catholic school teachers, reiterating that parents are the primary educators of their children. The focus was on the core mission of a Catholic school, which is "to have a religious dimension in the educational climate, in the personal development of students, in the relationship between faith and culture, and in the integration of all knowledge in the light of the gospel" (¶ 1). This organization decreed that teachers carry the prime responsibility for creating a unique Christian school climate, and that all disciplines require a religious perspective. Religious teachers were reminded that they are charged with answering religious questions that emerge within classrooms, networking with colleagues for assistance. The CCE (1988) also advanced that Catholic educators must respond to students with

> patience and humility, and should avoid the type of peremptory statements that can be so easily contradicted. . . . They were bound to be teachers of what it is to be human [and] to invite students to examine their own consciences. (¶ 92).

The CCE (1988) acknowledged the distinct origin and unique individuality of each student, noting that each is a child of her or his own age, race, nationality, tradition, and family. The organization also noted that teachers must provide sound pedagogy and demonstrate concern for pastoral care. The school itself was referred to as a "school-home"—a pleasant physical environment to be cared for by all (¶ 27). In such a school, the living presence of Jesus—the true Master Teacher—would enliven the community. The inspiration of Jesus must be translated from the ideal to the real, and the Gospel spirit must be evident in every aspect of the education climate.

The U.S. Conference of Catholic Bishops (2005) also clarified the importance of the core mission of Catholic education. This organization affirmed that the mission of Catholic education is

> to realize the fourfold purpose of Christian education, namely to provide an atmosphere in which the Gospel message is proclaimed, community in Christ is experienced, service to our sisters and brothers is the norm, and thanksgiving and worship of our God is cultivated. (¶ 2)

The USCCB also acknowledged that "Catholic schools are often the church's most effective contribution to those families who are poor and disadvantaged, especially in poor inner city neighborhoods and rural areas" (¶ 7) and commended their increase in support of students with disabilities and the goal of just wages. The USCCB described the benefits students receive from education within a Catholic school such as high graduation rates, a high percentage of graduates progressing to postsecondary education, high scores on standardized tests, and high performance on the three basic objectives of civic education (i.e., the capacity for civic engagement, political knowledge, and political tolerance). The USCCB advanced that Catholic teachers are to be professionals and examples of faithful living, and Catholic schools are to play a vital role in evangelization.

A distinct, articulated mission drives institutions of Catholic education (Breslin, 2000) and, as of 2012, standards and benchmarks are accessible for all teachers and administrators within Catholic schools to follow. The 2012 *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* (Ozar & Weitzel-O'Neill, 2012) identified the defining characteristics of Catholic schools as (a) centered in the person of Jesus Christ, (b) contributing to the evangelizing mission of the church, (c) distinguished by excellence, (d) committed to educate the whole child, (e) steeped in a Catholic worldview, (f) sustained by Gospel witness, (g) shaped by communion and

community, (h) accessible to all students, and (i) established by the expressed authority of the Bishop. According to Ozar and Weitzel-O'Neill (2012),

> The church's teaching mission includes inviting young people to a relationship with Jesus Christ or deepening an existing relationship with Jesus, inserting young people into the life of the Catholic Church, and assisting young people to see and understand the role of faith in one's daily life and in the larger society. (p. 4)

Breslin (2000) asserted that, within Catholic institutions, theory, and practice must jointly exist in a lived mission; words alone are insufficient for a mission statement. The life of the school must be focused on the mission, and leadership must always consider how decisions will sustain this vital mission.

Charism

According to Lydon (2009), the root of the word *charism* is "from the Greek word χα'ρισμα (tr. charisma) meaning gift. . . . The concept of χα'ρισμα derives from the grace of God given to all believers by virtue of their baptism" (p. 42). With grace as a universal gift from God to all baptized, Lydon posited that "a charism could be described as the realization in practice or the concretization of this universal gift" (p. 43). He referred to the biblical use of the term *grace,* especially by St. Paul, and noted, "A charism is the realization in practice of grace, a gift which enables the believer to contribute to the common good" (p. 43). Lydon observed connections between charism and leadership, especially within religious orders, and opined that the strength of charism among the founders of religious orders enables a significant contribution to education (pp. 44–45). Lydon perceived the strength of charismatic leadership in the following manner: "The charismatic leader will . . . demonstrate the ability to share his/her vision with the community, build up trust in the vision and create a genuine commitment to it" (p. 46).

Cook (2004) added to the existing body of research on charism by stating that "there are a variety of spiritual gifts and that each person is given a charism to help build the kingdom of God on earth" (p. 18). Fitzgerald (2009) observed that, in the Catholic tradition, "the definition of educational leadership is nuanced by the Gospel and often by the charism of a founding religious community" (p. 19). Cook (2015) postulated that the idea of charism can be extended to Catholic schools, noting, "Like religious orders and lay movements, Catholic schools are communities engaged in apostolic work that glorify and serve" (p. 6).

Monahan (1925) presented St. Madeleine Sophie Barat as a charismatic leader, often likening her spirit to fire, stating, "A flame of fire she was, and with its characteristics. . . . but the fire that no waters can quench was in the soul of Sophie" (pp. 3, 15). Monahan identified this "fire" in Barat as the strength of the emerging Society of the Sacred Heart, reporting, "For sixty-two years her Shepherd's lantern was the light of the flock; she was the 'stroke' of the oarsmen, the cross-bearer in the ever-growing procession, the strong support on which all rested, the centre to which all came home" (p. 79). While not using the term *charism,* Monahan has described the guiding identity of Barat as a charismatic leader of the Religious of the Sacred Heart. Grace (2010) specifically identified Barat as a charismatic leader, noting, "Catholic educational history records an impressive number of charismatic leaders including John Baptist de la Salle, Angela Merici, Mary Ward, Madeleine Sophie Barat and others" (p. 120). As the Society of the Sacred Heart grew and honed its identity, the Barat vision remained central to its emerging charism.

The Society of the Sacred Heart (1982) described the role of charism within the organization in the following manner:

> By our charism, we are consecrated to GLORIFYING THE HEART OF JESUS: we answer His call to discover and reveal His love letting ourselves be transformed by His Spirit so as to live united and conformed to Him, and through our love and service to radiate the very love of His Heart. (para. 4)

The Society of the Sacred Heart did not use the term *charism* per se; however, its meaning is reflected in the following excerpt:

> The aim of this Society is, therefore, to glorify the Sacred Heart of Jesus by labouring for the salvation and perfection of its members through the imitation of the virtues of which this Divine Heart is the centre and model, and by consecrating them, as far as it is possible for women, to the sanctification of others, as the work dearest to the Heart of Jesus. The Society proposes also to honour with particular devotion the most Holy Heart of Mary, which was so perfectly conformed in everything to the adorable Heart of Jesus her Divine Son. (para. 4)

Stuart (1914) presented an ideation of charism, referring to it as the "hall-mark of the Order" (p. 110) and

> an insatiable desire to give themselves to the utmost, for the glory of the Sacred Heart of Jesus, according to the spirit and Rule of the Society; a virtue which we call, perhaps in a colloquial sense, "devotedness," an uncalculating spirit of sacrifice, and with it a fixed resolution to give and to suffer for the sake of love alone. (p. 114)

From 1812 to 1982, the connection between the mission of the Society of the Sacred Heart (1982) and the Barat vision remained intact. The Religious of the Sacred Heart described the Society as "an Institute of pontifical right. With the same love which Saint Madeleine Sophie had for the church" (para. 1). Dyer (1997) identified the heritage of Barat and the Religious of the Sacred Heart as the distinguishing charism for Sacred Heart schools. Central to this united heritage is an openness to change. Stuart (1914) described this openness as part of the identity of the Society when she wrote, "[Barat's]

foundations remain, and our day builds on them according to the needs of time and place" (p. 85). In this spirit, the Religious contemporize the charism for their use.

The five goals and criteria have undergone their third iteration. In the Introduction to the 1990 version, the goals "express the values, the intentions, and the hopes of the Sacred Heart traditions, sharpened to meet the needs of a rapidly changing world" (Society of the Sacred Heart, U.S. Province, 2005, p. 16). The Society of the Sacred Heart (1982) defined the charism of the Society by including the following statement from the *Constitutions:*

> In all the circumstances of our life, wherever our mission leads us our sole purpose in living is to glorify the Heart of Jesus, to discover and make known His Love. We are sent by the church to communicate the love of the Heart of Jesus. (p. 236)
>
> Society of the Sacred Heart

The Society of the Sacred Heart was founded by St. Madeleine Sophie Barat, who was born on December 12, 1779 in the town of Joigny in France. She arrived 2 months before her expected due date amid a raging fire that consumed much of the town in which her family lived (Monahan, 1925). Despite her perilous entry into the world, Monahan (1925) reported that Barat lived for 85 years. She noted that Barat's older brother, Louis, a Jesuit, who was her godfather, as well as her primary educator, heavily influenced Barat. Barat thrived under the classical education that Louis provided for her and concurrently formed her own vision for education and faith. Kilroy (2000) reported that Barat rejected the widely held view of a harsh, Jansenist God and cultivated an understanding of a God of love, warmth, and vulnerability. Kilroy further noted that, living through a time of Revolution in France, Barat's "abiding instinct, expressed in her

relationships and in her understanding of institutions, was to conserve, to restore, to repair, [and] to renew" (p. 2).

Barat's faith led her to founding the Society of the Sacred Heart in France in 1800 when she was 21 years of age. On November 21, 1800, along with three other young women, Barat consecrated herself to make known the revelation of God's love and to live out the new motto of the Society—*Cor unum et anima una in Corde Jesus*—which translates to one heart and one mind in the heart of Jesus. In 1806, at the age of 27, Barat was named superior general and presided over a growing Society. Butler and Burns (2007) described the Barat tenure of leadership as challenging because she was repeatedly forced to assert herself in her own, quiet way to ensure that the direction of the Society remained faithful to the initial vision. The Barat teachings and philosophy, articulated in the *Constitutions,* were approved and adopted in 1815 (Kilroy, 2000). At the time of her death on May 25, 1865, Barat led a global community of women numbering 3,359. She was canonized a saint of the Roman Catholic Church on May 25, 1925. Currently, 2,560 Religious of the Sacred Heart practice within 41 countries around the world (Society of the Sacred Heart United States-Canada, 2014a).

The Monahan (1925) biography of St. Madeleine Sophie Barat dated the Sacred Heart schools as beginning in France during 1801, 1 year after Barat founded the Society of the Sacred Heart. The original convent and boarding school served French girls from families who could afford an "elite" education, and Barat also opened an accompanying free school in 1802 (Kilroy, 2000). The Monahan biography of Barat also described two core tenets of the Barat education creed. The first is that instructors are called to have a

manifested love of God in their hearts, for she believed that this love, by its very nature, would "spill over" to the children in their care. Barat held great love for children.

The second core tenet of the Barat education creed involved her belief that women had a mission in the modern world to heal the brokenness that resulted from the Revolution due to their powerful influence within the family (Monahan, 1925). Essentially, Barat believed that the faith that takes root in the heart of women thrives "to educate aright the heirs of such vast powers . . . to educate the world" (p. 63). The Society of the Sacred Heart (1982) articulated the importance of education in the Sacred Heart mission in the following manner:

> Above all, it is necessary that the religious whose vocation it is to work for the education of youth should have a lively sense of the importance of this work and its effectiveness for the spread of the faith, the honour of religion, and the re-establishment in the world of a high standard of morality and of true and solid piety. (para. 170)

Education Mission

As part of the Catholic Church, Sacred Heart schools are also called to their stated mission and education goals. The mission of Society of the Sacred Heart has, since Barat first began to articulate her vision for the Society in 1800, identified the education and formation of young people as a critical "arm" of the larger mission of the Society. The Society of the Sacred Heart (1982) stated that the Society "shares in [the church's] mission by making known the revelation of God's love, whose source and symbol is for us the Heart of Christ" (para. 3).

The education tradition of Society of the Sacred Heart embraces and celebrates the feminine and the influential role women play in home and family. Sani (2012) contrasted the traditional monastic schools for girls in the 1800s with the Jesuit-inspired

schools led by the Barat Society and reported that the Sacred Heart schools were more suitable to the demands of modern life and the role that women, especially women of privilege, played at that time. Barat aspired to educate girls in the same way boys were being educated, and this was not standard practice at the time. The Society of the Sacred Heart of the United States-Canada (2014b) described the Barat vision for Sacred Heart in the following excerpt:

> She saw women as the repairers of the torn fabric of society in France following the French Revolution and set about establishing a transformative education that would help them accomplish the task. In 1805, just five years after the Society of the Sacred Heart was founded, members drafted the first Plan of Studies to ensure consistently high standards in all Sacred Heart schools. The Plan was modified periodically, but always with a goal of educating the "whole person" – long before that concept became popularly used. (para. 2)

The first Plan of Studies was created by education leaders for the school at Amiens, France and it served as a guide for all that followed (Monahan, 1925). While academics were held in high regard, the focus of Sacred Heart education has always been on the formation of the individual. Stuart (1914) described this way of educating as allowing each child to be themselves, surrounded by attention and affection. She believed that children educated in this type of atmosphere would demonstrate their good and weak points in a trusting way, allowing the educators to know and correct their defects and assist with their development of self-control.

U.S. Schools

Throughout her tenure as superior general, Barat instructed members of her order to open Sacred Heart schools throughout France, Europe, the United States, and subsequently around the world (Williams, 1978). These schools served students of all ages and grades, from their early childhood years through their university pursuits.

St. Rose Philippine Duchesne joined the Society of the Sacred Heart in 1804 (Kilroy, 2000) and, in 1818, she led the first group of Religious to St. Charles, Missouri to open the first Sacred Heart school within the United States (Monahan, 1925).

Baumgarten (1994) wrote that the focus for the women in St. Charles, in keeping with the vision of Barat, was on the education of girls, who would become wives and mothers in charge of the moral direction of their homes. He noted that Duchesne welcomed girls from all walks of life into her school. She educated girls from wealthy families in a day school and boarding school and opened a free school to educate girls from poor families. She also educated orphans in her care and operated a school on Sundays that served Black girls within the community. Duchesne also opened her doors to Protestant students. Thus, the Religious of the Sacred Heart did not exclusively educate Catholic girls; they welcomed all girls who wanted to learn and grow, and this remains the custom of Sacred Heart schools throughout the contemporary United States.

The U.S. Sacred Heart schools for girls were originally formed to "mirror" the early French schools with a boarding school and a neighboring free school. As public education formalized throughout the United States, the free Sacred Heart schools closed; however, their boarding and day schools for girls remained open (Baumgarten, 1994). Schools and colleges opened and closed according to need and, in the aftermath of the Second Vatican Council, the Religious of the Sacred Heart within the United States recognized a need to unify and support the schools under their sponsorship. Since 1970, the schools in the United States-Canada Province have identified themselves as the Network of Sacred Heart Schools. As of the 2014-15 school year, 24 schools existed within the Network (see Appendix A).

Goals and Criteria for Sacred Heart Schools

The Network of Sacred Heart Schools first articulated and approved the five goals and their criteria in 1975 to respond to the question, "What makes a Sacred Heart school?" *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) emerged from the core documents and philosophy embedded within the education mission of the Society of the Sacred Heart. The Society identified the five goals as "rooted in the wisdom of St. Madeleine Sophie" (Society of the Sacred Heart United States-Canada, 2014b, para. 5). The second version of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 1990) was approved and released to the schools in 1990; the current version was approved and released in 2005 (Society of the Sacred Heart, U.S. Province, 2005).

In the preamble to the 1975 *Goals and Criteria for the Sacred Heart Schools in the United States* (as cited in Society of the Sacred Heart, U.S. Province, 2005), the Religious of the Sacred Heart stated, "The *Goals and Criteria* are the *sine qua non* for every school that belongs to the Sacred Heart network" (p. 14). As a means of assisting schools through periodic self-assessment of their adherence to these goals and their criteria, the Network of Sacred Heart Schools formed a commission in 1978 known as the Network Commission on Goals. Through the years, it has expanded in scope and formality and is now known as the Sacred Heart Commission on Goals (SHCOG).

According to Dyer (1997), the SHCOG process is a key component in ensuring the survival and vitality of the education mission of the Network. She reported that, for Sacred Heart schools, the assessment every five years includes a self-review; a Board

review; and a review of student report cards, publications, and annual student awards. She noted that all constituents are represented in the self-studies, from employees to the youngest students to the trustees and alumni. Administrators of Sacred Heart schools are held to rigorous standards, and these standards ensure that they remain aligned to the education mission developed by Barat. Dyer maintained that charism, heritage, and mission are intertwined in this assessment process and that the influence of Barat is weaved throughout the lived education mission of the Society of the Sacred Heart.

Decision Making

Organizational

Decision making is certainly a facet of the school-leadership experience, and it is also integral to the human experience. March (1994) studied and described a "logic of consequence" as a rational theory of choice that assumes that decision processes are based upon consequences and preferences. The choice is conditional on the answers to four types of questions: (a) a question of alternatives (i.e., What actions are possible?); (b) a question of expectations (i.e., What future consequences may result from each alternative and how likely is each possible consequence?); (c) a question of preferences (i.e., How valuable are the consequences associated with each alternative?); and (d) a question regarding the decision rule (i.e., How is the choice made among the alternatives in terms of values of consequences? p. 2). The March logic of consequence assumes that decision makers use reason in their processes of choice. They seek alternatives by making informed guesses surrounding future states of the world and how the decision maker will feel about that future. However, March (1991) also observed that in real-life decision-making situations, the decision makers rarely progress through the four types of

questions, but rather, they focus on one or two, and sequentially rather than simultaneously.

March (1994) identified four major constraints that limit rationality in organizational decision making: (a) problems of attention involving constraints in the way limited resources are allocated (i.e., individuals have limited attention and cannot see all aspects concurrently); (b) problems of memory and thus incomplete history; (c) problems of comprehension (i.e., decision makers with limited capacity for comprehension and making unwarranted inferences from incomplete information; and (d) problems of communication due to the limited capacity for comprehension. March observed the following common, constraining behavioral traits of individuals:

> Decision makers look for information, but they see what they expect to see and overlook unexpected things. Their memories are less recollections of history than constructions based on what they thought might happen and reconstructions based on what they now think must have happened, given their present beliefs. (p. 11)

March (1991) found that a logic of consequence is not applied to organizational decision making where a logic of appropriateness is more often applied in decision-making processes. March (1994) defined the logic of appropriateness as "rule following" and observed that, in organizations with strong identities, this mode of decision making is most common (p. 57). He stated, "When individuals and organizations fulfill identities, they follow rules or procedures that they see as appropriate to the situation in which they find themselves" (p. 57). In considering this logic of appropriateness, the reasoning in the process concerns establishing identities and matching rules to situations that are similar or perceived to be similar.

For decision makers to act in organizations with a strong identity, they are encouraged to understand their identities, situations, and appropriate actions (March,

1994). Decision makers ask the following questions: (a) a question of recognition (i.e., What kind of situation is this?); (b) a question of identity (i.e., What kind of person am I and what kind of organization is this?); and (c) a question of rules (i.e., What does a person such as I, or an organization such as this, do in a situation such as this? p. 58). March (1988) explained that, when decision makers follow the logic of appropriateness, their actions and choices appear as applications of standard operating procedures that are appropriate for the specific organization and its identity. In these kinds of organizations, appropriate rules, criteria, and duties evolve during a selection process that strengthens the perception of identity.

Kahneman (2011) described the differences between fast and slow thinking in decision making. He used the terms System 1 and System 2 to describe these differences. System 1 (i.e., fast thinking) "operates automatically and quickly, with little or no effort and no sense of voluntary control" (p. 20). In System 1, or fast thinking, individuals often unconsciously turn to various heuristics, or "rule(s) of thumb" to make decisions (p. 7). Kahneman observed that reliance on this mode of thinking "caused predictable biases (systematic errors)" in decision making (p. 7). System 2 (i.e., slow thinking) "allocates attention to the effortful mental activities that demand it, including complex computations. The operations of System 2 are often associated with the subjective experience of agency, choice, and concentration" (p. 21). Kahneman observed that, when the spontaneous, unconscious search for a solution fails, individuals switch to a "slower, more deliberate and effortful form of thinking" (p. 13).

Fast thinking is helpful in many situations, and it is the level of thinking that allows individuals to know certain information without expending a great deal of cognitive effort. According to Kahneman (2011),

> Fast thinking includes both variants of intuitive thought—the expert and the heuristic—as well as the entirely automatic mental activities of perception and memory, the operations that enable you to know there is a lamp on your desk or retrieve the name of the capital of Russia. (p. 13)

However, Kahneman concluded that the best way to improve decision making is to slow down because "little can be achieved without a considerable investment of effort" (p. 417). He observed that, in decision making,

> Organizations are better than individuals when it comes to avoiding errors, because they naturally think more slowly and have the power to impose orderly procedures. Organizations can institute and enforce the application of useful checklists, as well as more elaborate exercises. (pp. 417–418)

School Process

Lunenburg (2010) recognized connections between the types of decision making observed and described by March (1994)—the rational model and the bounded rationality model—and described how these two types exist in schools. He noted, "Administrative decision making is assumed to be *rational*" (p. 2) and described a six-step rational decision-making process that supports this assumption (see Figure 1). The first step is identifying the problem, which should be rooted in the mission of the respective school. The next step is generating alternatives tied to the goals or mission of the school to solve the identified problem. The third step involves evaluating the alternatives in a systematic manner, which will ideally yield many diverse alternatives. The fourth step of choosing an alternative occurs when the administrator or leader makes the choice that is best for the school among the alternatives generated.

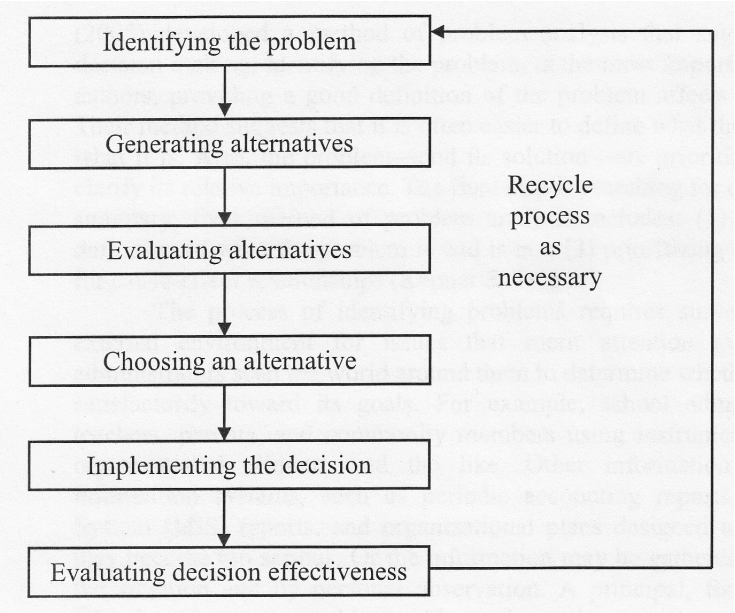

Figure 1. The decision-making process. From "The Decision Making Process," by F. C. Lunenburg, 2010, *National Forum of Educational Administration and Supervision Journal, 27*(4), p. 3. Copyright 2010 by National Forum Journals. Reprinted with permission.

Once the decision is made, the fifth step of the Lunenburg (2010) decision-making process is to implement the decision, and this is successful when the administrator has communicated the process clearly and explained the alternatives in a way that allows for support of the decision, provided resources to support implementation, established a workable timeline, and clearly assigned responsibilities. The final step involves evaluating the effectiveness of the decision. Lunenburg highlighted the importance of this final step as an "evaluation [that] provides school administrators with information that can precipitate a new decision cycle" (p. 7).

Lunenburg (2010) described how the bounded rationality model works within schools. While the rational model would be ideal, Lunenburg, as did March (1994), found that most decision makers in schools are hampered by common errors in decision making, explaining,

> Frequently, school administrators are not aware that problems exist. Even when they are, they do not systematically search for all possible alternative solutions. They are limited by time constraints, cost, and the ability to process information. So they generate a partial list of alternative solutions to the problem based on their experience, intuition, advice from others, and perhaps even some creative thought. (p. 8)

Lunenburg identified seven ways leaders make decisions with bounded rationality: (a) satisfying (i.e., choosing the first alternative that satisfies the minimal standards of acceptability without examining all alternatives); (b) heuristics (i.e., a rule of thumb that can help with making decisions); (c) primacy/recency effect (i.e., the decision maker is influenced by information discovered early or late in the search process); (d) bolstering the alternative (i.e., the administrator prefers one alternative to all others and looks for information to rationalize that choice); (e) intuition (i.e., a quick decision made without conscious thought); (f) incrementalizing (i.e., making small changes in the existing situation); and (g) the "garbage-can" model (i.e., a mixture of solutions and participants that must be matched with problems). Lunenburg did not propose any recommendations for school administrators on how to improve their decision making.

O'Sullivan (2011) also reviewed the models used in schools described by Lunenburg (2010). He referred to these types of decision-making models as "rationalist" in nature and wrote that the actual use of "rationalist models of good decision making is narrow, limiting, inflexible and dependent on a narrow conception of evidence" (pp. 13–14). He suggested that school administrators would benefit from instituting a process that blends three observed processes—rational, arational, and collaborative. O'Sullivan defined rational decision-making processes as those which involve conscious consideration. He referred to the Kahneman term *System 2* and also used the March descriptor of *bounded rationality* to identify the rational process (pp. 7–8). O'Sullivan

considered decision processes to be arational if they resemble what Kahneman referred to as *System 1* processes, which are based on intuition and heuristics. Collaborative or shared decision-making processes, according to O'Sullivan, are "often advocated to mitigate some of the issues with individual decision making (such as bias or entrained thinking) and to increase decision making quality" (p. 9). O'Sullivan recommended a blending of all three methods as a process yielding good decisions within schools.

Summary

All Catholic schools, including Sacred Heart schools, are bound by a common mission to evangelize the Gospel within the context of a caring, education community. Leaders in Catholic schools are called to know and foster the mission of Catholic education and to ensure that their actions and decisions support that mission. Orders founded with a specific charism, as well as the schools they sponsor and lead, are also called to support the mission of Catholic education and to propagate the vision and charism of their founders.

The Society of the Sacred Heart was founded to make God's love known in the world. St. Madeleine Sophie Barat, the Foundress, was committed to accomplishing this through the education of women. Her vision led to the expansion of the Society around the globe and to the founding of numerous schools for girls. St. Philippine Duchesne was entrusted to bring the Barat vision to the United States. The Network of Sacred Heart Schools was modeled from the work of Duchesne. The 24 schools currently within the United States and Canada are bound by *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), which emerged from the articulated education mission of Barat and from the *Constitutions* of the Society.

The manner in which individuals make decisions is described in detail by March (1988, 1991,1994) and Kahneman (2011). Through observation and research, March reflected upon how individuals and teams make decisions within organizations including value-based enterprises with strong identities. Kahneman identified the elements of fast and slow thinking in decision-making processes. Lunenburg (2010) documented the decision-making processes followed by school administrators and, in his work, he brought much of what March and Kahneman observed and applied to the school environment. Finally, O'Sullivan (2011) expanded upon the types of decisions made in schools, as described by March, Kahneman, and Lunenburg, and suggested a model for good decision making within schools that combines collaboration with rational and arational processes.

CHAPTER III:

METHODOLOGY

Restatement of Purpose

The purpose of this study was to discover, through face-to-face interviews and follow-up telephone interviews, the extent to which Heads of Sacred Heart schools within the United States apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions within their respective schools. The processes these Heads of school generally apply when making decisions was also investigated. The following research questions guided this study:

1. How do the Heads of school within the Network of Sacred Heart Schools in the United States apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their respective schools?
2. When have the Heads of school used *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions?
3. Are all decisions made by the Heads of school handled in the same manner or are only particular types of decisions viewed as applicable to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)?
4. In what way do Heads of school render decisions affecting the Network of Sacred Heart Schools (e.g., consistent procedures, a checklist or template, and/or other individuals involved in the decision-making process)?

Research Design

Qualitative methodology was applied in this study, which involved semistructured, face-to-face interviews with four active Heads of school within U.S. Sacred Heart schools. All interviews were performed in a consistent manner and follow-up sessions were conducted by telephone. The Clandinin and Connelly (2000) model for narrative inquiry was applied, which also adhered to practices described in the Kvale and Brinkmann (2009) approach to research interviews. Interviews are recognized as an acceptable form of data collection in narrative inquiry (Connelly & Clandinin, 1990). Those conducted for this study did not follow a published questionnaire; however, a preestablished set of questions was consistently used for each interview. Participant responses governed the ultimate number of questions posed. Latitude was granted to all interviewees in their responses to allow for deep reflection on the topic of decision making.

Clandinin (2013) defined narrative inquiry as "an approach to the study of human lives conceived as a way of honoring [the] lived experience as a source of important knowledge and understanding" (p. 17). Connelly and Clandinin (1990) identified data collection as the first step. Methods of data collection include a variety of means such as (a) field notes describing shared experience; (b) interviews; (c) storytelling; (d) letter writing; (e) autobiographical and biographical writing; and (f) other narrative data sources such as lesson plans, newsletters, and rules and principles. The researcher writes the narrative, striving for verisimilitude. Loh (2013) described the importance of verisimilitude as key to the trustworthiness of the reported data, stating, "For the study to

have trustworthiness, it must also achieve verisimilitude; it must 'ring true'; it must have believability" (p. 9).

Connelly and Clandinin (1990) encouraged researchers to ensure that explanations and descriptions of the "scene and plot" are included in the narrative. These researchers warned of potential risks, dangers, and abuses in narrative reporting including fictionalizing, an unwillingness to accept critical feedback, and attempting to "wrap up" the plot of the narrative in a neat Hollywood fashion (p. 10). In the course of a long-term study, when reams of data are collected, the researcher makes the choice as to which stories to include. The risk this presents must be acknowledged by researchers. Connelly and Clandinin wrote of the importance of ensuring a clear process is followed for inclusion selection. They also asserted that collaboration between researchers and their subjects is necessary for understanding and synthesizing data collected through narrative inquiry, stating,

> Narrative inquiry is . . . a process of collaboration involving mutual storytelling and restorying as the research proceeds. In the process of beginning to live the shared story of narrative inquiry, the researcher needs to be aware of constructing a relationship in which both voices are heard. The above description emphasizes the importance of the mutual construction of the research relationship, a relationship in which both practitioners and re-searchers feel cared for and have a voice with which to tell their stories. (p. 4)

Connelly and Clandinin (1988; 1990) identified narrative analysis as a qualitative research practice that is conducive to collecting data from educators. They observed that educators naturally gravitate to narrative descriptions of their experiences and posited that education experiences "should be studied narratively" (Clandinin & Connelly, 2000, p. 19). Huttunen, Heikkinen, and Syrjälä (2002) also espoused narrative research as an effective means of reflecting the "voices" of teachers. Because the sample in the current

study are educators, the guidance provided by Clandinin and Connelly was followed in the data collection and narrative composition.

Kvale and Brinkmann (2009) identified the following seven stages of an interview inquiry: (a) thematizing, (b) designing, (c) interviewing, (d) transcribing, (e) analyzing, (f) verifying, and (g) reporting. Thematizing involves the formulation of the study purpose and answers the questions of *why* and *what.* The *how* question is answered during the designing stage when the manner in which the research interviews will be conducted is determined. Interviewing refers to the actual performance of the sessions via dialogue with the participants. Following each interview, the data collected are transcribed, rendering subsequent data analysis possible. According to Kvale and Brinkman, all data should be verified to "ascertain the validity, reliability, and generalizability of the interview findings" (p. 102). The final stage involves the reporting of the findings and the methods applied "in a form that lives up to scientific criteria, takes the ethical aspects of the investigation into consideration, and results in a readable product" (p. 102).

Kvale and Brinkmann (2009) characterized the qualitative-research interviewer as both a "traveler" and a "miner." The traveler *constructs* knowledge while the miner *collects* knowledge. When mining, the interviewer "digs nuggets of knowledge out of a subject's pure experiences" (p. 48). The traveler metaphor suggests that the interviewer metaphorically "wanders the landscape and enters into conversations" (p. 48). From either perspective, "when discussing the epistemology of interviewing, it should be kept in mind that the interview is a special form of conversational practice" (p. 49). The idea

of the interviewer as traveler, constructing knowledge through conversation, spurred the focus of this study.

Population Sample

The population sample in this current study was limited to Sacred Heart Heads of school serving elementary and secondary grade levels within the U.S. Network of Sacred Heart Schools. Heads with different titles but comparable roles were also interviewed. Written permission was received from the acting interim executive director of the Network of Sacred Heart Schools (see Appendix B) to e-mail the Heads, inviting them to participate in the study. Upon approval receipt, all potential participants received an invitation by e-mail (see Appendix C). Those who expressed a strong interest in the study, received an e-mailed informed-consent form detailing the procedures involved in participation (see Appendix D). The form indicated that participation would involve one face-to-face interview lasting one hour, an opportunity to review field notes and provide feedback, and one follow-up telephone interview. Respondents who expressed an unwillingness or inability to engage in the process received no further communication. The four heads of School who agreed to participate were interviewed at a time and location agreeable to each participant.

Once a pool of potential participants was recruited for this study, a purposeful sample of male and female Heads of school from different geographical regions and varying lengths of service in the position was selected. Effort was made to include subjects leading schools that served a variety of populations including elementary-, middle-, and high-school students and those serving solely girls or solely boys or gender-mixed student populations. One study participant was a Religious of the Society of the

Sacred Heart. Such sample selection can pose a potential limitation to generalizability of the findings.

The decision to interview Heads of school for this qualitative research project was intentional because they play a unique role at their respective schools. They are leaders within their schools and trusted with great responsibility. They fit the description provided by Kvale and Brinkmann (2009) of "elites [as] persons who are leaders or experts in a community, who are usually in powerful positions" (p. 147). Kvale and Brinkmann identified specific considerations for interviewing elites. The "downside" is that they can be difficult to schedule for interviews and are frequently accustomed to depending upon familiar, frequently-used statements for their responses (p. 147). It is the responsibility of the interviewer to guide such interviewees past these tracks. The "upside" to interviewing elites, as identified by Kvale and Brinkmann, include their inherent confidence allowing them to feel less trepidation during the interview process than interviewees who have more fear surrounding exposing personal stories and their depth of knowledge, as well as less comfort in discussing their job roles. Kvale and Brinkmann highlighted the importance of interviewers with deep knowledge of the study topic with elite participants.

Validity and Reliability

For each interview conducted for this study, the same questions were asked for internal consistency. The validation principles for action research and narrative inquiry were applied, as identified by Heikkinen, Huttunen, Syrjälä, and Pesonen (2012) as a means for achieving validity (see Appendix E). Heikkinen et al. credited Kvale (1995, 1996) for the notion of validation as an "endless process of meaning making and

negotiation" (pp. 7–8). Heikkinen et al. strove to "find a way to combine narrative expression and validity" (p. 6). Consequently, these researchers compiled studies by numerous other contributors and synthesized their work to create five principles for validation: (a) the principle of historical continuity, (b) the principle of reflexivity, (c) the principle of dialectics, (d) the principle of workability and ethics, and (e) the principle of evocativeness. These five areas and their questions functioned as a rubric in this current study, against which this researcher critiqued the narrative constructed after data collection. These validation principles facilitated the collection of data that translates into a clear and compelling narrative.

The first principle advanced by Heikkinen et al. (2012)—historical continuity—encourages the attention of researchers to the historical context and background of their studies. This principle also refers to "employment," which requires information to be presented in a logical, narrative sequence (p. 8). It assists with checking plot, which Connelly and Clandinin (1990) identified as important in narrative inquiry. Heikkinen et al. credited Engeström and Kemmis (Engeström 1987; Kemmis and Wilkinson 1998; Kemmis and McTaggart 2000; Kemmis and Grootenboer 2008; Kemmis et al. 2011) for providing increased understanding of historical continuity.

The second Heikkinen et al. (2012) principle—reflexivity—refers to researchers understanding of their personal ways of knowing by engaging in reflective thought. Investigators acknowledge the nature of their relationship to the object of their respective research, identify their presumptions surrounding knowledge and reality, and are mindful of how they describe the materials and methods applied (pp. 8–9). This second principle encourages researchers to be aware of their personal experiences and biases related to

their topics of study and to be transparent in all personal descriptions. Application of this principle will assist in engaging the reflective thinking Heikkinen et al. referred to as "pivotal for an action researcher" (p. 8). Neuman (2014) identified reflexivity as a "technique that researchers may use to address and even guard against bias" (p. 2), again underscoring the importance of this validation principle. Heikkinen et al. credited Winter (2002) as the "father" of reflexivity and dialectics, and Angen (2000) for summarizing important ideas surrounding nonfoundationalism in epistemology.

The third Heikkinen et al. (2012) principle—dialectics—was focused on the interpersonal element of discussion in narrative inquiry. This principle emphasizes the importance of maintaining authentic voices of the participants, so they can readily recognize their own voices within the narrative report. It relates to the role of collaboration, which was championed by Clandinin and Connelly (2000) and the role of dialogue in establishing a collaborative relationship (Connelly & Clandinin, 1990). The fourth principle of Heikkinen et al.—workability and ethics—refers to consideration of the practical consequences of research on the subjects and the researcher. It also assesses the quality of the research conducted. This principle invites critical inquiry into the research process. Heikkinen et al. credit the notion of workability to Greenwood and Levin (1998). This fourth principle provides methods for researchers to check in on the ways the research affects both themselves and the interviewees. Heikkinen et al. illustrated the importance of this validation principle in the following excerpt:

> We need to consider the practical consequences of research on both study subjects and researchers as well as the scientific community, society and all mankind. In this respect, assessment of the quality of research should focus on its ability to address the ethical dilemmas that inevitably emerge in the course of research. (p. 10)

The fifth Heikkinen et al. (2012) principle—evocativeness—asserts that "good research awakens and provokes thought about things in a new and different way [and that] the most significant learning experiences are always both cognitive and affective in nature" (p. 10). Face-to-face interviews elicit both affective and cognitive responses. Heikkinen et al. acknowledged Patton (2002) as advancing the artistic and evocative dimension. The fifth Heikkinen et al. principle supports the Clandinin (2013) view of storytelling as the "heart" of narrative inquiry. Clandinin wrote, "Stories of school are powerful shapers of these stories we live in and by" (p. 22).

Data Collection

The face-to-face interviews with four Heads of school from U.S. Sacred Heart schools were conducted in the fall of 2014 at times and places agreeable to the participants that afforded the respondents privacy and comfort. The sessions consumed approximately one hour. Kvale and Brinkmann (2009) discussed the importance of "setting the stage" for an interview (p. 128). Participants are first briefed on the subject matter to acclimate or reacclimate them to the focus and purpose of the interview. At the close of the interviews, these researchers recommended debriefing the interviewees to allow them to express any final thoughts or ask any questions emerging throughout the interview sessions (p. 129). Kvale and Brinkmann noted that this debriefing generally occurs after the recording device has been turned off; however, any further data gleaned from this debriefing phase can be included in the data collected with permission from the respective respondents.

Kvale and Brinkmann (2009) identified several effective types of interview questions: (a) introductory questions to invite spontaneous, rich descriptions of personal

experience; (b) follow-up questions to extend initial responses; (c) probing questions to clarify the content of particular answers; (d) specifying questions to clarify identified actions; (e) direct questions to introduce interview topics or added dimensions (p. 135); (f) indirect questions to uncover interviewee attitudes toward a topic area (p. 136); (g) structuring questions to close an exhausted line of questioning and open another; (h) silence to provide an opportunity for reflection; and (i) interpreting questions to synthesize responses. These types of questions were used, as necessary, to yield meaningful data throughout the interview process of the current study. Prior to the actual interviews in the current research, the demographic data were collected via e-mail (see Appendix F). The interview protocol is provided in Appendix G.

The initial four interviews were the primary sources of data in this study. The sessions were transcribed and the transcripts were emailed to the respondents, inviting their feedback and providing an opportunity for an accuracy check or any additional information viewed as important by the participants. The follow-up telephone interviews were scheduled to receive this feedback. This method allowed greater scheduling flexibility and cost effectiveness. The downside to a telephone interview is the absence of gestures and facial expressions, potentially limiting the ability to gauge the authentic nature of the responses. Such interviews can also present limited opportunity for elaboration or follow-up due to time constraints. This may have limited the ability to gauge the truthfulness of the responses. Additionally, a telephone interview may offer limited complexity for elaboration on responses or follow-up questions due to potential time constraints. The researcher received permission to record these telephone

interviews, as well, and they were also transcribed. The transcripts were e-mailed to the respective respondents for their review and approval.

The interviews conducted for this study investigated the manner in which the participating Heads of school applied *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions and identified any consistent processes the Heads implemented for this purpose. Prior to the first interviews, demographic data were collected from the respondents via e-mail (see Appendix E). Data were subsequently collected through face-to-face interviews, which were recorded with the permission of the interviewees using a digital recorder, and follow-up telephone interviews, which were also digitally recorded. These recordings were reviewed to ensure accurate transcription and the transcripts were subsequently provided to the respective interviewees for accuracy checks. The follow-up telephone interviews clarified and confirmed the data collected in the primary interviews and, as noted earlier, were recorded and transcribed with the permission of the participants.

Data Analysis

Data collected from all four interviewees were compiled and arranged by me and presented together to address the four research questions. The data were analyzed based upon the reported demographics and upon the agreement or disagreement among the four Heads of school with regard to their application of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to their decision making. Areas of agreement contributed to identifying themes related to each of the four research questions and provided a way of organizing the findings.

The interview transcripts were reviewed several times to determine whether the interviewees provided answers to the four research questions. The researcher determined that the research questions were addressed and further analyzed the text to present the responses in an organized, thematic manner. The responses provided by the participating Heads were most frequently in agreement and themes were identified from the data. To clarify the emerging themes, a topical grid was generated indicating whether each participant provided feedback for each thematic idea. This method effectively identified when the four Heads were in agreement and highlighted any outliers or disagreement among the responses. Kvale and Brinkmann (2009) presented guidelines for reporting interview quotes, which were followed in the reporting of the data collected in this current study. The eight guidelines are

> (a) the quotes should be related to the general text, (b) the quotes should be contextualized, (c) the quotes should be interpreted, (d) there should be a balance between quotes and text, (e) the quotes should be short, (f) use only the best quote, (g) interview quotes should generally be rendered into a written style, and (h) there should be a simple signature system for the editing of the quotes. (pp. 279–281)

The most relevant quotes from the data collected in this research are presented in a contextualized manner within the findings. The interviewees responded naturally and spontaneously in the interviews, and because this study is not focused on any local dialect or vernacular speech, what Kvale and Brinkmann (2009) described as "repetitions, digressions, pauses, 'hm's,' and the like" were edited out of the recorded responses (p. 280). No sentences were manipulated through these deletions to change the meaning or intent of the responses. The *signature system* implemented to protect confidentiality involved brackets surrounding words replacing identifying terminology or references and ellipses signifying words deleted from the sentence due to the described repetition,

digression, or pauses. The length of quotes was controlled along with their placement to refrain from presenting lengthy quotes without the proper context or explication.

Ethical Considerations

The process dictated by the University of San Francisco Institutional Review Board for the Protection of Human Subjects was followed in this study. The initial application was submitted to the Board on March 28, 2014 and approval with exempt status was granted on April 1, 2014 (see Appendix H). The researcher complied with all protocols required by the Board including obtaining written informed consent from the participants. The approximate participant time commitment was clearly articulated to all participants, which was 15 to 20 minutes for completion of the demographic questions and their e-mail return, 60 minutes for the face-to-face interview, and 20 to 30 minutes for the follow-up telephone interview, plus additional time for the participant accuracy check of the transcripts. The study sample was also clearly informed that their participation was voluntary and advised they could withdraw from the study at any time without repercussion of any kind. The researcher informed them that their rights to anonymity and confidentiality were guaranteed. The participants understood no compensation would be received for their involvement in the study nor would they be reimbursed for any expenses they might have incurred as a result of their participation such as transportation costs.

The population sample in this research were fully informed of the benefits and risks of study participation. The key benefits are that (a) the Network of Sacred Heart Schools will be served by gaining an understanding of how Heads of school within the Network apply the *Goals and Criteria for Sacred Heart Schools in the United States*

(Society of the Sacred Heart, U.S. Province, 2005) to their decision making and any consistent processes in place for this purpose at their respective schools; (b) the participants will have an opportunity to reflect upon the manner in which they make decisions and learn from that reflection; and (c) participation in this study will contribute to the body of existing research within the realm of education. The risks associated with participation in this study were minimal; however, the interviewees may have experienced concern over the professional safety of honestly reporting the extent to which they apply goals and criteria to their decision-making processes. To mitigate this concern, all responses were reported in an anonymous fashion and no individualized data was included. Pseudonyms and minimized geographical identifiers are used in the study toward this end. All audio recordings are stored in a password-protected electronic file, and the paper copy of the transcribed interviews is securely stored. When appropriate, following completion of the study, the original files and transcription will be destroyed in a secure manner.

Role of the Researcher

In qualitative research, the investigator is an instrument of data collection (Bogdan & Biklen, 1992; Kvale & Brinkmann, 2009; Patton, 2002) and, as such, is of vital importance in participatory study. Neuman (2014) offered the following overview of the role of the researcher in qualitative study:

> Because of the insightfulness, flexibility, responsiveness, and judgment a human being can bring to the research setting, the researcher is the ideal data-gathering device who can pursue emerging dimensions of a study that are beyond the scope of instruments designed in advance. Thus, qualitative research requires the researcher to assume full personal responsibility for each phase of a study. He or she determines which facets of a phenomenon to observe, which interview questions to ask, which documents to gather, and so on; he or she also determines how to interpret each segment of the data collected, how to analyze the data

> systematically and accurately, and how to draw conclusions that are consistent with the analysis. The researcher engages in a highly personal way throughout the study and understands that he or she filters data through personal perspective and experience. Insightful, informed personal interpretation—with conclusions warranted by rigorous adherence to methodological criteria—is the goal. (p. 74)

The researcher's background is provided to support my assertion that she was qualified to conduct this research. The study sample received this information upon first contact when invited to participate in this research.

The researcher attended a Sacred Heart school from kindergarten through high school, graduating and entering the alumnae association on the evening of commencement ceremonies. She has been an active Sacred Heart alumnae member, engaging with her alma mater as class fund captain, volunteering for mentoring, and writing for the alumnae magazine. She recently served on a task force to set the direction for the Stuart Center based out of Washington, DC. She worked as a teacher and administrator for 11 years at the Schools of the Sacred Heart in San Francisco, serving as the dean of students at Stuart Hall High School and the head of school at the Convent of the Sacred Heart High School. During those years, the researcher participated in two SHCOG processes. She is knowledgeable in the history, philosophy, and charism of the Sacred Heart and has an understanding of the teachings of the Foundress and of the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). She is currently completing her doctoral degree in Catholic Education Leadership through the University of San Francisco Catholic Education Leadership Program.

Limitations

This study is limited in size due to the qualitative methodology applied and the minimal number of Heads of school within the Network of Sacred Heart Schools. Among those Heads who responded and were willing to participate, further limitations existed due to the self-reported data, which may not accurately represent the application of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) or of the implementation of consistent processes when making leadership decisions. To reduce the likelihood of bias, any Heads of school with whom the researcher has worked were excluded from the study, as well as any individuals with whom the researcher has had personal friendships or other collegial relationships. These exclusions, however, may have adversely limited the amount of data collected for the research. A limitation may have been presented by opting to interview solely Heads of school and not engaging with other school leaders such as division heads or Board Chairs. These leaders also engage in decision making associated with their roles in service to their respective schools. Consequently, certain population groups may be underrepresented or not represented at all within the data analyzed.

The researcher's own bias, as the researcher in this study, is a potential limitation. As a qualitative research project, with the investigator functioning as the primary instrument, it was necessary for the researcher to have a keen awareness of the following Peredaryenko and Krauss (2013) observations:

> The researcher, consciously or unconsciously, brings to the research setting his or her own predispositions, assumptions and beliefs, which may align or diverge from those of his or her study participants. This is especially true if the researcher has a strong affinity with the population under study. (p. 1)

As an alumna of a Sacred Heart school who held administrative leadership roles for this network of schools for 11 years, the researcher possesses a "strong affinity with the population under study" (p. 1). Therefore, every effort was taken to ensure any personal bias did not influence the data collection nor analysis conducted for this research.

CHAPTER IV

FINDINGS

Overview

The purpose of this study was to discover, through face-to-face interviews and follow-up telephone interviews, the extent to which four Heads of Sacred Heart schools within the United States apply the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)[1] when making decisions within their respective schools. The particular issues explored were when decisions are made, as well as the manner in which Heads of school make decisions with consideration to *Goals and Criteria for Sacred Heart Schools in the United States* (i.e., to what extent consistent procedures, checklists or templates, and other individuals are involved in decision making). Through the study interviews and compilation of the subsequent narrative, the answers to these questions emerged along with relevant themes.

The following research questions guided this study:

1. How do the Heads of school within the Network of Sacred Heart Schools in the United States apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their respective schools?
2. When have the Heads of school used *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions?

[1] It is recognized that the five goals and criteria, while informed by the Mission of the Society of the Sacred Heart, which is to make God's love visible in the heart of the world, are not the actual, articulated Mission.

3. Are all decisions made by the Heads of school handled in the same manner or are only particular types of decisions viewed as applicable to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)?
4. In what way do Heads of school render decisions affecting the Network of Sacred Heart Schools (e.g., consistent procedures, a checklist or template, and/or other individuals involved in the decision-making process)?

To protect participant confidentiality and anonymity, no disclosure of identities was practiced in this study to the greatest extent possible. Consequently, the descriptions of the participants are presented as a group profile rather than individual profiles. The findings are reported by the respective research question and subsequently summarized. Unless otherwise indicated, all quotations were drawn from the interview transcripts (Shurley, 2014). Respondent quotes are identified solely by assigned pseudonyms.

Sample Profile

The four Heads of school who participated in this study— two women and two men—represented a collective 116 years of experience in education and 40 years experience in their positions within the Network of Sacred Heart Schools. Their individual experience ranged from 22 to 34 years in the field of education. At the time the study was conducted, all four participants held the title head of school at their respective institutions, one of which is coeducational, two serve solely girls, and one school serves an all-boy student body. The academic levels of the schools range from prekindergarten through Grade 12, and all four schools are located either on the East Coast of the United States or middle America.

The education background of the study participants is varied; two hold degrees in education, all four hold a bachelor's and master's degree, and two hold doctoral degrees. Three of these four education leaders have worked in more than one Sacred Heart school; none were graduates of any Sacred Heart institution. The Religious of Sacred Heart were represented by one participant and the other three were laypeople. All four participated in the SHCOG at their respective schools and three participated as part of a visiting team.

The demographic backgrounds of the four Heads of school were considered during data analysis. No distinguishing differences were observed among the demographic profiles of the participants. Although both genders were represented, as well as lay and religious and varying years of service within Sacred Heart schools, the interview responses did not demonstrate connections unique to any of these factors based on the researcher's analysis of responses. Consequently, the data were presented and organized according to the four research questions that guided the study.

Research Questions

Research Question 1

Research Question 1 asked, "How do the Heads of school within the Network of Sacred Heart Schools in the United States apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their schools?" The four participating Heads of schools affirmed with confidence that the goals and criteria of the Network of Sacred Heart Schools pervade all aspects of their leadership and are present in all decision making (including hiring practices, personnel issues, budget allocations, etc.). They readily and comfortably spoke of the mission of Sacred Heart education, as well as the missions of their individual

schools. They all described active submersion in the goals and criteria on a regular basis; however, none of the Heads suggested the existence of any explicit practice of assessing whether the goals and criteria had been properly applied in any given situation.

In the interviews conducted for this study, Kathleen revealed how the goals and criteria of the Network of Sacred Heart Schools had become the "lens" through which she views decision making. She firmly believes that, as a result of intentional formation and focused attention to understanding the goals and criteria, she and her leadership team do not explicitly invoke the goals and criteria, but rather, they are internalized and thus pervade all decisions made in the school. Kathleen explained,

> We all invoke the goals and criteria, but how is [it] that they all invoke it? It's from being inside of the people who are making the decisions, and how is it that the goals have gotten inside of people who make the decision? I think it's because the goals are formatively talked about, beautifully and deeply, and I think that there are lots of people here who live them, beautifully and deeply, regularly, and again, I go back to that phrase, "It's the life lived." It's in living them and watching people live them and watching other people invoke them, and as a rationale for either doing or not doing something, that people learn how to then use this as the lens for making the decision because are they used as a lens? Absolutely, on every level. How are they used as a lens? People invoke them and talk about them. Not because they're formally put in front of everyone, but because they're inside of people, and they're inside of people because of things that are done way before any one decision needs to get made. (pp. 6–7)[2]

Chuck also reflected on the power of the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) as a formative document that influences day-to-day decisions made at his school. He stated,

> It's actually what you do and how you behave, and I think that's one of the key things. The goals and criteria are always in the background of how we behave and how we interact with one another, and how we treat one another, then it really is absorbed by the students and by the faculty and staff the longer they're here. The more they actually live the goals, [they become] a part of who they are. (pp. 47–48)

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[2] Unless otherwise indicated, all quotations in chapter 4 are taken from the following document: Shurley, A. (2014). *Interview Transcript*.

When the need arises to explain or articulate the rationale behind a decision, Chuck finds value in his deep understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). While the goals and criteria may not have been explicitly invoked in the process, they are there to refer to in support of a direction implemented. He has found that members of the school community frequently need time and patience are frequently needed while working to accept or understand a decision. Chuck stated,

> The goals and criteria are not only useful in decision making or [in] knowing that they guide decisions, but they are also great as a support. Once those decisions are made, saying this is who we are and this is who we need to remain . . . you have to fight the other tides that are out there. (p. 57)

When a base understanding of the goals and criteria is present, the acceptance or understanding of decisions based upon them eventually manifests.

All four participants in this study strongly believe that the goals and criteria of the Network of Sacred Heart Schools are referenced when making decisions at their respective schools. Kathleen described an array of decisions that she believes were rooted in the goals and criteria, as reflected in the following interview excerpt:

> Whether it's the board of trustees, whether it's me and my administration team, or me and my management team, we would all agree and articulate that the goals and criteria are so central to what we do and how we operate, that they are, in fact, the lens through which we would make every decision, and I would say that about decisions that are strategic, decisions that are financial, decisions that are curricular, decisions that are instructional, even decisions that are programmatic, decisions that are disciplinary [and] decisions that are about the schedule, that they are so important to how we run and operate the schools, that they're very much a part of us. (p. 1)

Brady also referred to the goals and criteria as a lens through which decision making is viewed, stating, "There's definitely a lens through which you see decisions. You know it's made up of these goals" (p. 15). Nora reported, "I think they [goals and criteria]

permeate everything that we do. I think all decisions are foundationally informed by the goals and criteria" (p. 25). Chuck added, "[The goals and criteria] are always at the core of all the thinking that goes on at the school when we make decisions" (p. 46).

The four Heads of school participating in this study described factors within their schools that facilitate the understanding or application of the goals and criteria in decision making. The importance of a foundational understanding of the goals and criteria emerged in (a) discussions on mission; (b) the use of individual criteria; (c) the public role of the Heads of school; (d) physical representations of the goals and criteria within the schools; (e) school culture; employees (i.e., hiring and formation); (f) administrative, teams, and (g) the disciplinary practices of classroom teachers and parents.

Mission

When the study's participants discussed how the goals and criteria of the Network of Sacred Heart Schools are applied when making decisions, they all referred to mission-focused decisions as particularly influenced by the goals and criteria. It was common for the interviewees to use the term *mission,* or being in service of the mission, interchangeably with the goals and criteria. Chuck specifically spoke to this, stating, "It is being able to refer to that mission that is incredibly helpful, and I would say almost more supportive because I do think that the goals and criteria just define what every school should be" (p. 53).

According to Kathleen, "The mission will win, in terms of everything else [that] can be usually figured out" (p. 9). As head of her school, she views herself as in a key role, that of "animator" of the mission, which she articulated in the following interview

excerpt, as the goal of creating a child who is integrated in the five ways that mirror the five goals[3]:

> And if that's our goal, to create a child who is integrated in these five ways, then we can engage in a conversation of "Okay, what do we need to get there?" My role in it is perhaps just being the one that helps, as the animator. I think the biggest role of the head of school is to be the animator of the mission. In thinking about that, there is never a moment where I am not in some way or another being the biggest "cheerleader" of forming everyone to understanding what our purpose is here—the big goal. (p. 10)

One way Kathleen works to animate the mission is to begin meetings with the board of trustees with what she refers to as "mission minutes." She explained,

> What we do, for example, on the trustee level, we'll start every meeting with just a little something that's meant to be educative, informative for the trustees, about the mission in general, the mission as we know it, as articulated in not only the goals but the criteria inside each of those goals and, over time, by coming to know the school, by participating in those mission minutes, but I would say, almost even more importantly, by listening, to being observant of how other trustees process decisions and operate, [the] kinds of questions that are asked, that new trustees quickly learn how to use these overarching principles as a guide to why we do what we do and how we do what we do. (p. 1)

When asked about whether the mission is considered when making significant decisions, Kathleen spoke to the importance of clarity and the depth of understanding surrounding the mission, especially in the way it affects the experiences of students. She stated,

> I think there has to be real clarity of the mission. As part of the process, in making decisions, always coming back to these questions of "Is this consistent with the depth of the mission?" "Is this going to help the children ultimately be able to live these five aspects of God's face in their lives?" "Are they going to be able to live in these five ways and thus reveal God in these five ways?" and "Is this helping us to help the children reveal God's face in these five ways?" (p. 9)

Chuck agreed that the students are the focus of the lived mission when he stated, "None of our schools make any sense if they're not for the students and, ultimately, that's

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[3] The five goals, as written in *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) state that Schools of the Sacred Heart commit themselves to educate to: (a) a personal and active faith in God, (b) a deep respect for intellectual values, (c) a social awareness which impels to action, (d) the building of community as a Christian value, and (e) personal growth in an atmosphere of wise freedom.

what we have to look at" (p. 48). In the following interview excerpt, Nora shared her belief that the mission of her school identifies and differentiates the facility from other schools in the area:

> I think it absolutely is the difference maker between us and the school across the road, you know. Nice school, strong school. I don't think their mission is nearly as clear or strong as ours is; I think we know exactly who we are. I think we know exactly what we're trying to provide for students and it's all of those things, and we don't "pull any punches" about it when people come and visit us. We are who we are. We're a Catholic, Sacred Heart school. We're very ecumenical. We welcome every [student] from every faith background. We are intellectually rigorous. (pp. 31–32)

When describing a recent physical plant addition to his school campus, Brady took great care to articulate the ways in which the mission was considered in the process of planning and building. He described the new building as beautiful and state of the art while fulfilling the mission rather than serving as a mere "showpiece," as reflected in his following interview comments:

> This was a function of the school's mission, so we were very diligent about every step along the way, saying that, "You know, it's kind of built into the architecture of the place." We made sure that the building itself was conducive to wide use. In fact, on the first floor, there is an office . . . that is . . . now the center for our community-service efforts, just kind of built into the place. (p. 15)

Kathleen described the importance of parent formation to the mission of the school and explained that this is done with intention and focus. She believes that, by taking the time to work consistently with parents, from the time their children are enrolled in the school, questions will not emerge on, for example, why students spend so much time outside the classroom in retreats, attending advisory meetings, or on service projects. She referred to these types of questions as more typically from a new parent or perhaps a parent whose child recently transferred into middle school. She recounted a typical conversation with a parent that could necessitate a reference to the mission of the

school in the following manner: “They might say, ‘Wow . . . you can take a lot of time doing these trips,’ to which I would reply, ‘But this is who we are and this is what we’re about’” (pp. 3–4).

Use of Criteria

The use of individual criteria emerged in several of the study’s interviews. Kathleen referred to the importance of the criteria, as part of formation into her school, stating,

> Given the clearly articulated five principles and all of the clearly articulated criteria under each of those five goals, we know, and everybody who comes onboard, whether it’s new teachers or parents [or] new Board members, everybody knows these are the things we’re saying that are really important. (p. 2)

The study participants suggested that they use the criteria to more deeply consider decisions and discernment within their schools. Chuck described his growth in understanding the criteria since he became a Head of a Sacred Heart school in the following manner:

> I would say the overall feel and value behind the goals resonated with me, but if I were honest, I would have said, “Oh, you know all those detailed criteria, you know, it’s too much.” Almost bureaucracy, but since then, in my [number deleted to preserve anonymity] years here as Head, I’ve come to value the specificity, as well, that sometimes you can just go to one criteria and say, “This is it, this is right at the heart of . . . what we didn’t do or need to do or needs to be done, or will guide this decision.” So yeah, I guess I’m one of these people that’s gone from the goals to the criteria that define the goals. (p. 65)

Brady spoke of the importance of the criteria, stating,

> The criteria really aren’t paid enough attention to, so lately, what I’ve been doing is that, whenever anyone comes in with a proposal . . . I ask them to begin it by referring to [a criterion], so if they want to do a particular program, “please root it in a criterion that you find.” (p. 15)

This interviewee believes that this exercise has layers of benefit because it creates a sense of mindfulness around the specific project and also provides an opportunity for those within his school community to gain a deeper understanding of the criteria.

Nora and Chuck both specifically referenced the third criterion of the fourth goal, "Adult members of the school model and teach skills needed to build community and practice clear, direct and open communication (p. 8, *Goals and Criteria for Sacred Heart Schools in the United States,* Society of the Sacred Heart, U.S. Province, 2005), by commenting, "Adult members of the school model . . . teach skills needed to build community and practice clear, direct, and open communication" (p. 9). This criterion resonated with them and, interestingly, both added the word "honest" when they described this criterion, although it is not in the actual wording of the criterion within *Goals and Criteria for Sacred Heart Schools in the United States.* Nora described how helpful this criterion is in inviting productive conversation, stating,

> I think the other piece that really has resonated for me is the criterion that talks about an open, honest, and direct communication and I think really trying to put a premium on that and explaining to people that you know sometimes what you hear you don't like to hear and so therefore you say, "Well, I'm not being communicated with." (p. 28)

With regard to her administrative team, Nora commented, "Always the phrase that comes, that I hear more than anything, is 'open, honest, direct communication.' Let's be honest about what's going on here and how we can do a better job" (p. 38).

Chuck also spoke of how much he values the third criterion of the fourth goal, stating, "I think those goals and criteria are so . . . valuable with, you know, direct and honest communication" (p. 48). He spoke with even greater depth on how he uses and values this criterion in the following interview excerpt:

> I guess conversation or reference to one of the criteria that calls for open, honest, direct communication. I just find that one criterion to be so helpful, and [it] may be helpful because I feel that there's a need for constant reminding of that. If people were just open, honest, and direct, and that doesn't mean that, you know, they have to be, you know, flip or harsh, but be open, honest, and direct. They can be compassionate and still diplomatic in their communication. . . . So many issues . . . become greater issues [that] would not go in that direction [and] would be more easily resolved. I find that, in some ways, one of the most important and valuable of the criteria, but also the most challenging. (p. 63)

Leader Role in Public Forums

Cook (2015) wrote, "Leaders must use the limited occasions when they speak publicly to students and other constituencies to reference mission and charism or even give minihomilies about them" (p. 76). The study's participants each addressed how they perceive their role with respect to ensuring that the goals and criteria are lived within their schools. Kathleen communicated that she explicitly attempts to "make sure everybody is deeply inculcated into the culture of utilizing these goals" (p. 5). She described the manner in which she accomplishes this in her public role as head of school in her following interview comments:

> I try not to miss a moment to explain more deeply, if I'm in a public forum. . . . We have these day-long faculty meetings. I do try, whether it's through the prayer service or whether it's through a little explanation before or after the prayer service or whether it's through a formal-like presentation that I do periodically, some aspect of this, of this mission, but those moments then get inside of them, and then the inside of them then gets lived in how they interact with each other, how they interact with the children, what they ask of the children, how they help [the children] reflect. (p. 7)

Chuck used the term "bully pulpit" when describing the responsibility of a head of school to educate to the goals and criteria of the Network of Sacred Heart Schools. He stated,

> I would say, you know, one of the processes as a Head I think is to . . . use the bully pulpit, or whatever one wants to call it, and . . . whether it's verbal or written communications, constantly remind people of that importance. (p. 50)

Chuck decided to write letters to the families several times a year, focusing on one of the five goals. He was concerned that he might be viewed as "too preachy," but instead, has received positive feedback and encouragement, as reflected in his following interview comments:

> I started sending out these letters and it's clear to me that many, many more parents read them and think about them . . . to the extent where I've had some parents say, "I put this on my office door because I wanted people to see the kind of school that my [child] attends." (p. 51)

While no other study participant used the phrase "bully pulpit," Brady did speak of his responsibility in his public role as a head of school to ensure the goals and criteria are known and lived within his school. He takes advantage of public forums to promulgate understanding of the goals and criteria. Brady explained,

> One of the other things I do, by the way, is that, at the opening faculty meeting, the talk I give there is also the talk I give to the trustees; it's also the talk I give at the first parent meeting. We still take a goal a year, but what I've been doing lately, is always talking about, again, that intersection of goals at these meeting[s], and I've found that's really very, it's very worthwhile to do that. . . . We're looking at Goal 3, but . . . the talks I gave at the beginning of the year and kind of continually refer to . . . how the service goal [Goal 3] means nothing unless it's seen in light of your relationship with a good God who loves you [Goal 1], and you have to constantly do the work, but also reflect on that to kind of achieve that, and if you don't, the service work actually becomes just a form of vanity to make you feel good, and that's not the point at all. When you're doing service, it's for something greater than just you feeling better about yourself, so that's been the challenge this year. How do we make the act richer by that kind of reflective context? (pp. 21–22)

Nora described how, as head of school, she navigated a crisis situation in her school and how she chose to use the public forum as a means to focus on the positive elements of the moment rather than the challenges. She commented, in "hindsight," she could have chosen other messages to deliver in that forum, but described what she chose to express in the following manner:

> I think as a Head [I was] trying to weigh not sending a message of "doom and gloom" with [a message of] "Let's get going." I probably erred on the side of telling them less while I was probably "tearing my hair out" going, "My God; oh my God, this is bad; we've got to get going," and putting kind of more of a face on for them and saying, "We're going to be fine," but internally being very nervous. (p. 29)

Reservoir of Goodwill

Brady introduced the idea that Heads of school benefit from a "reservoir of goodwill" which becomes helpful when the Head must make a decision that may be difficult for some community members to understand or accept. Even when reference to the goals and criteria would support the decision, there is benefit to establishing trust among the school community. Brady described in the following interview comments how he views this phenomenon:

> You hope, overall, that the decisions you've made have built up a reservoir of goodwill so that, when you hit the rough decision where you know Person X doesn't agree with you, there's enough goodwill there to kind of counterbalance the disappointment at not being heard on that particular issue. . . . So the effort is really to build up as much goodwill and as much confidence so that, when you do have to say "no," there's a greater likelihood that you can overcome it rather than it becoming the issue. (p. 18)

Brady further described how he remains available when there are questions surrounding his decisions in the following interview excerpt:

> My door's open all the time; people just kind of "pop in," but . . . as you know, when you're dealing with an employee issue or certain financial issues, you can't say much. So do people question your decisions? Yeah, obviously, because they're worried about, well, "If someone else got dismissed, could it happen to me?" You know, what's that all about? Some of it's "naked" self-interest. Some of it is concern for the other person, but again, it goes back to building up that reservoir of goodwill. If you have that, then you can ride through. If you don't, then you're in trouble. (p. 20)

Nora also recognized the importance of building trust in relationships. In her case, it was necessary to work backwards in this endeavor, but she learned from the experience. She explained,

> I've "owned that" with my people. . . . I think when you come in to something that's in crisis, sometimes the thing that suffers the most is that kind of relationship piece because you're in such a hurry to just "stop the bleed[ing]" that, oftentimes, the time and the care you would take to really explain or give yourself time to kind of "roll things out" slowly, you don't feel you have the ability to do that as well. (p. 27)

Her school community is working on building that trust and reservoir of goodwill, now that they have progressed to less of a crisis mode. Again referencing the third criterion of the fourth goal, "Adult members of the school model and teach skills needed to build community and practice clear, direct and open communication (p. 8, *Goals and Criteria for Sacred Heart Schools in the United States,* Society of the Sacred Heart, U.S. Province, 2005), Nora described the current state of her school in the following manner:

> We're practicing open, honest, and direct communication, and sometimes that means you and I both hear things we don't want to hear, and we have to figure out how we construct change and meaning in times when the discourse is dissonant—that you're thinking one thing and I'm thinking another—and I'm thinking, "Well, I've got all these reasons; you got all your reasons, but someone's going to make a decision that somebody's going to feel like . . . their point of view didn't get listened to." So that's a little bit of the struggle when you work within that framework, but then you just keep going back to then, "Okay, how do I go back when that person's upset or angry and rebuild that relationship and try and bring that person back in and say, 'I know that disappointed you. I know you weren't happy with that. How can I give you some space or time to do something different that will make you feel like you've got more control or you've got more input' or whatever the case may be?" So those are the things that we've worked on. (p. 28)

Physical Representation of Goals and Criteria

Each study participant mentioned the importance of physically displaying the goals and criteria of Network Sacred Heart Schools, either displaying the actual words or representations of the words throughout their school buildings. This practice emerged from intentional decisions to keep the goals and criteria in focus at their schools. The school displays of the goals that Kathleen used were rearticulated or distilled down to one or two words and distributed throughout the campus. Nora used prints of the full *Goals*

and Criteria for Sacred Heart Schools in the United States (Society of the Sacred Heart, U.S. Province, 2005) posted on doors and walls. She explained, "They're in the building all over. I mean, we frame them and hang them everywhere." (p. 32). Several times during the interview, Nora gestured toward the framed copy adorning her office wall. The school displays hung by Chuck are five cloth banners representing through visuals, rather than words, the five goals, and Brady took advantage of five, already existing exterior pillars on one of the school buildings to display one-word representations of the five goals.

School Culture

Kathleen and Chuck both spoke of the strength of culture within their schools and attributed that strength to the influence of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). Cook (2001) defined organizational culture as a "way of life within a particular organization" (p. 5), and the participating Heads of school supported this description. As Kathleen articulated, "It's the manner with which things are done. It's informed by the goals and criteria because we have reverenced the God within the child before us" (p. 7). Chuck also perceives a strong call to ensure that *Goals and Criteria for Sacred Heart Schools in the United States* become a facet of the school culture. He stated,

> The goals and criteria call us . . . to not really create a curriculum around them, but to have them permeate the culture of the school, so that fits my philosophy as an educator. I think school culture is more important than any curriculum. . . . The more people you can really help [to] develop a deeper understanding of the goals and criteria, than the more it becomes embedded in the culture of the school, and when it's embedded in the culture of the school, it doesn't seem like there's a unique decision process going on. It's just, "This is the way we are." (pp. 47, 55)

Cook agreed with the importance of the intentional formation of community members to the culture of a school, stating, "Catholic educational leaders must deliberately and consciously introduce and immerse newcomers into the culture for the purpose of passing on school culture through acculturation and socialization." (p. 16)

Kathleen had recently attended a conference for the Network of Sacred Heart Schools on Goal 5, "Schools of the Sacred Heart commit themselves to educate to personal growth in an atmosphere of wise freedom" (p. 9, *Goals and Criteria for Sacred Heart Schools in the United States,* Society of the Sacred Heart, U.S. Province, 2005), and commented,

> Schools of the Sacred Heart commit themselves to educate to personal growth in an atmosphere of wise freedom. . . . One thing that kind of sparked in me was the whole conversation I had at the Goal 5 conference about creating a particular culture within a school, and I think that the particular culture is what we talk about when we say, you know, "Oh, they finally get it." Well, what's "it"? It's this culture that we create, which is different than the harsh "tossing of your hair, rolling of the eyes" culture that you find in some either independent schools or even the public schools or wherever. I mean, I think it's a culture [at Sacred Heart] that is gentler and expects a lot of children, but it expects a lot from them on every level of their being, but it does so in a very gentle way. It's a kind culture . . . it's respectful, it's reverent. I think it's a reverent culture. (pp. 12–13)

Kathleen connected the importance of establishing a culture informed by *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to those in school leadership with the following interview comments:

> Creating a culture that has all of those aspects [is] important, I think [it] actually helps in the decision-making process at the administrative and managerial level. It helps in the execution process at that teacher level, and it helps in the decision-making process at the Board level, as well. Like, I think of strategic decisions, strategic directions. I mean, that's all informed by the goals and criteria. (p. 13)

Three of the study participants discussed discipline and how it functions within their respective schools. Kathleen described her view on discipline in the following manner:

> I don't even use the word discipline; I always say "invite them to growth," because I think that's a more respectful phrase. Discipline can be interpreted as being harsh, and I think that St. Madeline Sophie's way of helping people become their best selves was always by invitation. (p. 8)

Chuck discussed his view of discipline by explaining that, while some schools seek character-development program packages, *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) provides a sufficient framework for discipline scenarios. He stated,

> Our disciplinary program is all based on the goals and . . . criteria. Our division heads would say that, when a student behaves inappropriately, one of the first things that they do is sit down with them and they go through the goals and criteria and say, "Okay, what were you not . . . following?" Our process includes, no matter what the consequences are of any misbehavior, any violation, part of the process is a reflection on the goals or the criteria that was not followed. So it's wonderful because everyone [else is] talking about how do you bring in a character education program, and our sense is that we have one that's tried and true. (p. 47)

Nora described her philosophy on discipline in the following interview excerpt, which she gleaned from speaking to an alumna of a Sacred Heart school, and how this philosophy calls upon teachers and administrators to help students through challenging moments:

> I had a friend who went to a Sacred Heart School and she said the nuns used to say to her, when she was doing something stupid, "Oh, child of the Sacred Heart, what were you thinking?" And I thought, "That's what you want. You want to say, 'What were you thinking and how can I help you to realign what your thought process was?' rather than just saying, "Oh, you're not living Goal 5, personal growth; exercise Goal 5." Well, let's help them. (p. 36)

Employees

When asked to reflect on the formation of new employees, on how they ensure that new employees gain an understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), the study participants agreed that this is critical to ensuring the sustainability of the mission and

focus of their respective schools. Brady expressed that it is an expectation that all new employees will attend, within their first two years, the summer conference hosted by the Network of the Sacred Heart Schools and known as *Roots That Give Us Wings*. This conference is focused on the history and heritage of Sacred Heart education and develops and nurtures the connectedness of the mission of Sacred Heart educators. Brady clarified that an understanding or appreciation of the mission is a requirement for employment within his school. He explained,

> I've rejected candidates for positions in the school, and I'm at the very end of the process, so if someone gets to this office, it means that he or she has passed all of the kind of academic credential tests, personality, interaction test. If they come in here and they don't answer my questions about the goals sufficiently, I won't hire them. Even if they've been approved by everybody else up to that point, so what's happened after a couple times when that's happened, the division heads are much more keen to vet that question before the person gets here because they don't want to waste their time. (p. 18)

Nora described the formation experiences for all new employees within her school. New employees receive a set of materials that includes *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), as well as the history and terminology of Sacred Heart education. She believes this is of deep importance, acknowledging she is not a member of the Religious of the Sacred Heart. She commented,

> We go through the "whole nine yards," because, again, we're not the nuns, and so we make a really deep effort to say, "We know that we don't live in community." We don't live the charism every day like a [religious] community does, so we have to be really intentional about how we form people to [the] mission. (p. 37)

Kathleen provided the following description of her approach to inviting new members of the school community into understanding and living *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005):

> It means living a life; it's deeply connected interiorly on multiple levels and then revealing that faith of God in multiple ways through our lives, so I'm very intentional about how we inculcate new people into this, whether it's new families and trying to help them understand this broad way of living and educating. Inculcate new faculty, inculcate new staff and, once they're here, to try to constantly deepen it. (p. 5)

Effective Hiring

Kathleen and Nora both spoke at length on the importance of hiring good people, especially when they are filling positions on their leadership teams. Kathleen acknowledged her areas of strengths and weaknesses, and the importance of hiring to fill those gaps. She stated,

> I rely on the finance person. Certainly [I have] sufficient enough of a math background that I understand budgets, but I'm not a finance "guru," and I certainly rely on the principal of the school. I understand a lot about curriculum and instruction, but she's much more of a guru than me, so I think I'm humble enough to know when people are really good at what they do, and I also am smart enough to hire people who are really good at what they do and humble enough to let them do what they're really good at. (pp. 9–10)

Similarly, Nora articulated her strength in hiring good people when she stated, "One thing you may not know about my leadership style is that I hire really good people and I let them do their jobs" (p. 34).

Teacher Growth

Chuck and Kathleen described the ways they observe that teachers, as well as members of the leadership teams, have internalized *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) and applied the text to decisions related to students. Chuck reflected on what he has observed during his years as head of school and on how gratifying it is to see

> that growth of the internalization [of the goals and criteria] over the years in faculty and staff . . . and division heads; they use . . . goals and criteria all the time in their work with the [students], and then seeing it in the [students]. (p. 65)

When asked if members of the administrative team or teachers would be likely to cite *Goals and Criteria for Sacred Heart Schools in the United States* during decision making, Kathleen replied,

> Among the leadership of the school . . . lead teachers, mentor teachers, and managers, administrators . . . those goals are so inside of them, that as we talk about schedule, personnel, curriculum, if somebody doesn't say it . . . it would be an odd meeting. (p. 4)

Administrative Team

In response to a question on the number of administrative members with Sacred Heart background and how that affects or does not affect team engagement with *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), Nora detailed the manner in which her team of school administrators was formed. She explained,

> My CFO had been at this school for 10 years, left to have a couple kids, was the CFO at the school across the street, was there for about 10 years, and then came here when I came because the school really needed her and, by that time, her [elder child] was graduating. . . . My director of institutional advancement was neither Catholic nor Sacred Heart, but absolutely comes from a faith-based background and the goals and criteria resonate so deeply for her and everything that she does and her people do, always. I mean, she's a model for what you would hope would happen in a department. . . . My director of admissions came from a school down the road, but she's Catholic and has been a part of Catholic communities in this area for a very long time and did her master's-degree work on single-sex education. I think that she definitely believes everything that we have. . . . My director of communications is Jewish and she says I like to play up the fact that we're ecumenical and spend less of the time on Catholic and more on God. (p. 36)

Ultimately, Nora believes that her administrative team considers goals and criteria in every decision they make and that they believe in the importance of the mission. She substantiated this belief in the following interview excerpt:

> [The goals and criteria] are posted outside my advancement office and, when they have their meetings, they talk about that. They say, "What are we doing this for? Why are we trying to raise the funds that we're trying to raise?" . . . I think the

> business office is the same way. I mean, they're trying very hard to make sure that these goals are lived in our school, that the school is here for [students] and most everybody [on the team] has children in the school, so they "buy into" what we're doing here and they want to preserve it. (p. 29)

Brady described how his administrative team addresses hiring and how, while they do not use any articulated guidelines for hiring, he believes they are always seeking increased understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) or a willingness to embrace that philosophy by listening for cues during interviews of prospective teachers. He explained,

> [The administrators are] listening for, "Well, yeah, I have an appreciation of a good God who loves me," right? So that's kind of like Goal 1. "I love community service"; that's Goal 2, but it's not like anyone's asking questions on each one of those. It's kind of what you pay attention to, in [the] way the person . . . to be interviewed [responds], that's helpful. (pp. 18–19)

Summary of Findings

The participating Heads of school interviewed for this study affirmed that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is applied by all levels of leadership within their schools for all decision making. The interviewees demonstrated in tone and terminology their appreciation and affection for this document as a resource and guide for their leadership. They expressed deeply internalizing this resource, rendering a formalized review unnecessary. A more critical action is for this population of leaders is reflection and reengagement with *Goals and Criteria for Sacred Heart Schools in the United States* on a regular basis and to ensure this practice by all within their school communities.

While the study participants do not explicitly review *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) before or after decision making, they acknowledged their internalized

understanding of the text and the understanding of their school communities as foundational to decision making and in supporting decisions. Several themes emerged during the study interviews that relate to factors that contribute to creating an environment supportive of decisions ultimately rooted in *Goals and Criteria for Sacred Heart Schools in the United States.* These themes are (a) a sense of mission, (b) the application of individual criteria along with the general goals, (c) the role of the head of school in formation, (d) physical representations of *Goals and Criteria for Sacred Heart Schools in the United States* on Sacred Heart school campuses, (e) an intentionally established school culture, including student discipline, (f) the formation and hiring of appropriate employees, and (g) the composition of administrative teams.

Research Question 2

Research Question 2 asked, "When have the Heads of school used *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions?" Throughout the interviews conducted for this study, each participant provided multiple examples of how he or she applied *Goals and Criteria for Sacred Heart Schools in the United States* during decision making. These examples included (a) decisions involving the boards of trustees, (b) budgets, (c) financial aid, (d) buildings and facilities, and (e) school programs.

Board of Trustees

The four participants spoke positively with regard to their boards of trustees and the partnership. Members of these Boards seem committed to understanding and applying the goals and criteria during Board-level decisions. Kathleen described in her

following interview one intentional way in which she assists her Board members to remember the goals and criteria:

> One thing that I have started doing at my board meetings—I started this last year—is they each have a name placard, but on the other side of the name placard—the side that faces each person—I've put a list of the five goals as a way of reminding them that this is what we're about. (cited in Shurley, 2014, p. 59)

Nora expressed deep faith in the understanding and appreciation her Board demonstrated for *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). When asked if she ever has trouble convincing the board of trustees at her school that a particular action or decision is or is not in line with the mission, she replied that she has

> [A] group of trustees who very much are invested in forming the mission, who understand that everything that underpins us is the goals and criteria, so it's never a "hard sell" with them because they believe so firmly in them as well. (p. 26)

Brady worked with the board of trustees of his school on a major building project. One board member assumed the role of protecting the mission of the school as the project moved forward, continually ensuring the mission was at the forefront. Brady described the experience in the following manner:

> We didn't have to convince everybody, but we just had to constantly remind people because, when you're doing something like this, your focus is on contracts, construction costs, permits, building codes, and, in our particular case, the difficulty of building something in a very dense setting, and we constantly had to remind ourselves it's not just "bricks and mortar" and construction; it's a construction to serve the mission, right? (p. 16)

Keeping the mission in focus through this building project was made easier through the engagement of a number of trustees who, according to Brady, appointed themselves as "watchdogs" for the mission. Brady provided the following description of one trustee in particular who was active throughout the process:

> Whenever a publication about the building came out, we knew that she would be reading that for mention of mission, and if we didn't have it prominently mentioned, we'd be getting a phone call from her. We knew that, if in a public discussion of it, whether it's a fundraising event or a parent meeting, if I didn't say prominently what the mission was, I was going to get a call from her, "Brady, you forgot to mention it. Why didn't you mention it more?" So it was a constant reminder of . . . "Don't take that for granted. It's got to be part of the vision of the building." (p. 16)

Chuck described a difficult personnel situation that eventually became a deeply formative experience for the board of trustees at his school. An allegation arose in relation to the past history of an employee prior to arriving at the school. The Board, comprised primarily of businesspeople, called for an expedited resolution, which is how a situation of this type would be managed within a business setting. In the following interview excerpt, Chuck described how he worked through the incident with the Board:

> The goals and criteria . . . helped me to be able to work with the Board [and] initially actually oppose them and say, "There's nothing in our mission that says we want to educate our [students] to become young [people] who make expedient decisions" . . . so we talked about compassion and about [the] courage to do the right thing and, ultimately, after investigating the faculty member [who] is still here, is very beloved, and, interestingly enough, the Board now owns it as one of the best decisions they ever made. They've kind of forgotten what they were initially urging. (pp. 46–47)

Budget

Budget decisions within Sacred Heart schools often overlap Board-level decisions. Nora, Chuck, and Kathleen all described examples of how they worked with their respective Boards to make decisions that would affect their budgets and concurrently align with the school commitment to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). Kathleen articulated her reasoning behind a decision to fund a global studies program in her following interview comments:

> The board of trustees, they're very aware that, even though it costs more to head the Global Studies Program, it's very consistent with the goals and criteria so, therefore, it's important to have that in the budget so nobody questions it. (p. 2)

Chuck described how he and his Board addressed decisions on budget to support the school goal of using sustainable energy. While immediate agreement was not received, Chuck experienced positive responses over time. He stated,

> The process was the constant reminder that this is part of who we are and making them aware I'm not trying to be a "spendthrift." Over time, what I found was one trustee who really got it and became a champion of "green" and [I] let him work with me and, ultimately, I really handed it off to him, and he became the champion of [green, saying] "Let's look at sustainable design whenever we can." (p. 49)

When Nora was asked if she had ever felt the need to confront the board of trustees on a budget issue in the name of the mission, she described a decision process she experienced with the Board to determine whether to bring in foreign-exchange students through establishing a relationship with a third party. This was an attractive proposal because these types of students generally pay full tuition with ease and, at the time, the school was experiencing decreased enrollment that was affecting their projected financial stability. A small number of exchange students had been welcomed in the past; however, the two scenarios would differ significantly because the proposed students would possibly live in a dorm rather than with local families. Nora explained how she and the Board agreed that this strategy, although it would bring an infusion of cash, would not ultimately serve the mission of the school or serve the prospective students in a manner that would meet school expectations. The decision was made to enroll a limited number of these nonresident students, even though it would have been financially beneficial to accept more into the school. Nora recounted,

> There was a very conscious effort on the part of our Board and . . . our admissions office to say, "We don't want to exploit these students. We want to make sure

> that, for what they're paying, they're getting a really great experience." They're getting what they came here for, which was an experience of being [in] home[s], learning English with American families. (p. 43)

Nora strongly believes that the intent of the goals is to ensure that any exchange student has an experience that mirrors the typical experience. To accommodate more than 30 exchange students, dormitory accommodations would be necessary due to an insufficient number of families to take in that many students. Nora described to her Board how different the experience would be for these students when compared to that of local students. She stated in her study interview,

> They have to feel like every [student] feels here, that this is her home. How does it feel that way when you go to a dorm at night and you speak [a foreign language] with everybody and you're not in the plays, you're not . . . and so, what we love is that we look around and we see these [current exchange students] and they're in the clubs. They're in, you know, they're doing the things that other [students] do in our school, and we feel like, you know, that's very goals driven; that's very intentional, and it was an opportunity where we could have just taken the money and run, and there are places I've been where [they] would have done it. (p. 44)

Ultimately, the Board agreed with Nora and, while the addition of a large number of students would have positively affected the budget, the head of school and Board were in agreement that this type of addition would not serve the mission of the school.

Financial Aid

Decisions on financial-aid policy emerged in the interviews conducted for this study as related to how *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) or the mission influences school direction. One interviewee spoke proudly of the willingness of his school to extend financial aid above and beyond the norm dictated by the National Association of Independent Schools, of which the school is a member. This head of school reported,

> We did a financial-aid policy and really looked at "How do we open up access to more kids? How do we make sure that we are always a very diverse school? How do we make sure that we're serving students across a variety of socioeconomic strata?" We [give] a lot of money in financial aid; 33% of our kids are on some sort of aid. Millions of dollars literally go in to FA [financial aid] and we look at the NAIS [National Association of Independent Schools] norms and we're way above, but we said we don't care. That's who we are. Our mission is to serve a broad range of students, so that drives what we do, so we're not worried that we give out a lot of financial aid. In fact, we'd be worried if we weren't. (p. 38)

Another study participant echoed these sentiments when describing the financial-aid policy of the respective school, recounting remarks made by a recent campus visitor who was the Head of a neighboring school. The visitor recognized the greater diversity among the student body than existed within his own school. The Sacred Heart Head revealed to this visitor that, in fact, the diversity is broader than simply racial and ethnic; it includes socioeconomic diversity and is intentional and supported by the Board of Trustees. This study interviewee recounted,

> I said I've had moments in my [identifying number deleted] years here when, you know, it can start with one voice that might gain a little bit of traction and the Board will say, "Yeah, we're giving away too much financial aid." You know the full payers are subsidizing, you know all the language that you've heard . . . and you just hang in because you say, "This is who we are." (p. 56)

This study participant reported that his school had, in recent years, crossed over to 30% of the student body receiving some level of aid. Conversations with concerned Board members consistently ended with the Head pointing out, "We do it by discounting tuition, and yet, we still operate in the black. I said [to the Board], "We should be proud of that, not worried about that" (p. 57).

Another perspective on decisions made surrounding financial aid was communicated by a study participant who worked with the board of trustees of the school to change policy related to raising the threshold for financial aid. In this case,

conversation surrounding the mission of the school involved questioning the appropriate nature of enrolling students from profoundly impoverished families. Following the economic downturn in 2008, as an effort to maintain enrollment, donors funded full scholarships for students from families at the lowest income levels. Over time, the head of school observed unanticipated and heartbreaking results of this decision. Painful outcomes emerged from the school policy mandating that all families contribute toward the education of their children. This study participant recalled,

> I had these families that literally couldn't figure out how they were going to pay their water bill, and I'm asking them for $3,000 over the course of a year, and every day was a new saga, a new story, getting kicked out of their home, and it's the same kid who's getting invited over to the multimillion-dollar mansion on Saturday for a party and I'm thinking, "This is killing me." (p. 44)

This interviewee expressed concern over the responsible nature of enrolling students who are not able to cover even the small-scale expenses of daily school life. The head revealed,

> I've got [students] that come in every morning and they copy on the library copy machine the pages of the book because they can't afford the book so they're copying another kids textbook, or they're asking their friends to buy them lunch. (p. 44)

While this head of school could see that this program was not working, the Board needed more convincing, suggesting that the students could be supported financially in terms of "soft costs" such as paying for trips or other enrichment activities, as well as tuition. The Head believed that strategy would work for students who were, perhaps, in a slightly higher socioeconomic group, but would still be disastrous for students living in deep poverty. The head's concern is summarized in the following interview comments:

> To say to a young [student], "I'm going to pay for your trip to Europe when your mom can't pay the light bill" is ridiculous. You know this is ridiculous. I want [the student] to have opportunity, but I don't want [the student] to live in a world that is so disparate that it's got to do something to you inside. (p. 44)

Although the school has changed its policy on the low threshold for financial aid, this Head was proud of the accomplishments of the students who did go through the program:

> The [students] that we put through that program are in great schools. One's at [Ivy League college named]. I mean, it was an opportunity that probably couldn't have been afforded any other way. I just wonder about the long-term impact (p. 45).

Physical Plant/Facilities

Cook (2015) wrote,

> Times of construction and renovation present exciting opportunities for school communities to reflect on their particularly religious character [and he encouraged schools to be] intentional about including the sacred when shaping campus environment in a manner that is meaningful to that school community. (p. 18).

Three of the four Heads of school participating in this study spoke of intentional design decisions in the renovation or construction of campus buildings that either explicitly invoked *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) or implicitly responded to a call to action included in the document. One participant stated during a school tour that much of the campus architecture was designed to evoke a Christian spirit of reflection.

Three study interviewees provided examples of decisions related to the physical plant that were intentionally rooted in *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). The examples underscored the importance of consideration to this document at all levels of decision making. To best preserve the anonymity of the study participants, these interview excerpts do not reflect the assigned pseudonyms of the speaking Heads of school. One interviewee opened the session with the following example:

> This was a literally concrete example [from] a buildings-and-grounds meeting, and we were having a conversation about sewers, and we had just learned as a

> school that there was something wrong with our sewer lines. . . . The city had come to us and said, "You need you attend to this issue and we'll give you 'X' amount of time." (pp. 1–2)

According this Head, it quickly became clear that the repairs would be quite costly, and this was not an expense that had been budgeted. In the conversation among the Board members, one individual suggested waiting until the repairs were absolutely necessary. The interviewee described what happened next in the meeting in the following manner:

> You could have heard dead silence in the room, and I wasn't sure who was going to speak first, but I looked around for a second. I thought, "Well, I'll jump in if nobody else is going to say anything," but almost within 5 seconds, a very strong person said, "It's just now how we do things at this school. What we do is what's right, no matter how much it costs." (p. 2)

Another study participant described a recent addition of an athletic facility, stating, "We just constructed a new gym and a pool, and the constant debate through this was how the emphasis was "this isn't a new . . . gym" (p. 15). Beyond the physical reminders, such as a donor board that includes a quotation from Madeline Sophie, the architecture of the business plan also reflects the mission. When considering the times when the building would not be in use by students, rather than just renting the facility as a means of generating revenue, the business plan first agreed to commit significant hours to community service and donate use of the facility to local groups serving those in need. Only after the needs of the school have been met and no requests have been received from other nonprofit organizations does the school rent the facility to earn revenue (p. 16).

Another study participant described decisions that heeded the fifth criterion of the third goal, which stated, "The school teaches respect for creation and prepares students to be stewards of the earth's resources" (Society of the Sacred Heart, U.S. Province, 2005, p. 8). This interviewee recounted,

> We just renovated; what you've walked into is a renovation. This was a convent and there were narrow hallways, not much light, [with] rooms . . . the sisters called cells that we would knock the walls down . . . so, when we did the renovation, one of the things that we took advantage of—it added about another almost half a million dollars to the renovation—is that we decided to shift our HVAC to [a sustainable energy model named] because of that goal and that criterion being stewards of God's creation. It costs more money, but we said, "It's the right thing to do." (p. 46)

Stewardship

Heeding the fifth criterion of the fourth goal of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), which focuses on respect for creation and acting as stewards of the earth, one study participant, with the support of the Board, converted to a sustainable energy source. Another way this criterion emerged in the study interviews was when Nora described actions she has taken to reduce consumption levels within her school. She stated,

> We've really taken a hard look at our use of resources, and we've really tried to limit our "carbon footprint." We've tried to conserve energy every way we could. We did an evaluation of our energy consumption and were mortified, for the size building we were, how much energy we were consuming, and so went to the Board and said, "We're called to really steward the Earth's resources, and we're not stewarding them well. We have a building that really needs to be rethought in terms of how energy is used and how it's conserved," and so we went and had an audit of our building and we really prioritized the things that we felt would first and foremost make the difference in lessening our consumption. (pp. 26–27)

To further improve their sense of stewardship, Nora decided to change the way food service was handled at the school. For some years, it had been the practice to use disposable, Styrofoam materials because there was not a functioning dishwasher in the kitchen. The school funded the repair of the dishwasher and subsequently sought a food-service company that could help meet the school goal. Nora described the actions taken in the following manner:

> We actually went out and did an RFP [request for proposal] for a new food service, and part of the RFP was you have to use silverware; you have to use

> plates. We have to teach kids how to recycle. We have to have a station where food is scraped and that things are reused because, again, the goals call us to be good stewards. (p. 27)

School Program

Kathleen spoke in detail with regard to the strong consideration given to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) during several programmatic decisions within her school. Her following description demonstrates the interconnectedness of several program-level decisions related to the daily schedule and curriculum and how they were all deliberately and intentionally rooted in the goals and criteria:

> Our schedule conversation this year was riddled with comments about Goal 3 and Goal 5. Interestingly, as I think back on those schedule conversation[s], we never talked about Goal 1 because it never was a question of "Well, maybe we can cut Masses." Nobody ever mentioned that, but there was a question of, "Well, do we have fewer Goal 3 service trips or do we cut back the advisory?" (2014, p. 5)

In relation to this conversation, Kathleen stated,

> We cannot have a school that doesn't engage in service or a school that doesn't engage in that kind of advisory development, so we've got to go back to the table and figure it out. I mean, not that anybody would not have had them in this schedule, but I think there was just this, "Well, maybe we just have a little bit less here or a little bit less here," and then what we ended up doing was creating a schedule where there was, for the middle school students, no passing time. (p. 5)

The idea of not having a passing period was uncomfortable for some personnel within her school; however, Kathleen addressed these concerns by invoking Goal 5 of the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), which states, "Schools of the Sacred Heart commit themselves to educate to personal growth in an atmosphere of wise freedom" (p. 10). She spoke to engaging faculty in the following manner:

> We're just going to make some assumptions and talk to the kids about the wisdom with which they're going to exercise their freedom in getting in and out of classes

> and if they need to go to the restroom. Let's assume some Goal 5 (Schools of the Sacred Heart commit themselves to educate to personal growth in an atmosphere of wise freedom) activity here, some Goal 5 intentions on the part of the students and the part of the teachers, so asking the teachers to remember this is a school that has this goal. What does this goal mean, as it relates to how the students move from class to class and operate and make decision, how they're going to use their time as they go from class to class and what book they need and what . . . how much time they need to do it, and when do they have their opportunities for conversation because Goal 4 (Schools of the Sacred Heart commit themselves to educate to the building of community as a Christian value) is important, as well, and how do we structure that end? (p. 5)

In crafting the schedule, Kathleen noted that the goals were constantly invoked as guides. The resulting schedule has longer core classes and "captures and engages them, yet also provides them with the breadth of what we want to provide them within a educational environment that educates to more than just their head" (p. 12).

Nora described decisions surrounding program evaluations at her school. It is the practice of this school to focus on one program area each year, bringing in outside consultants for insight and feedback. When selecting external experts in areas specific to Sacred Heart, great effort is taken to ensure the experts will understand the underlying philosophy of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). Nora explained,

> When we look at programs that are specific to Sacred Heart—for example, our service learning program—we bring in people from other Sacred Heart schools so, while we think it's nice that other schools have service programs, we really want our service program to reflect Goal 3 in ways that Sacred Heart schools live that out so, for us, the decision to bring in only Sacred Heart service evaluators who run service programs at Sacred Heart schools was a very conscious one. We don't want our program to look like [local public] high schools or [local private] high schools. We want it to look like a really strong Sacred Heart school, so we want that "critical eye" of other people who value what we value. (p. 26)

Advisory

Nora agreed with the idea that consideration of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)

must be schoolwide and throughout the advisory program. She described a major change in this school program, which she and her administrative team believed to be imperative for a positive student experience. She detailed the process through which it was decided to implement a new advisory program to address concerns. Despite the size of the school, too many students had reported there was no adult on campus who really knew them well. Additionally, there was not an efficient system of transferring student information from year to year. In the case of a student with a learning difference, parents needed to come in every year and present the learning needs of their children. As these issues became clearer, Nora had the opportunity to hire a new upper-division Head who had recently created a new advisory program at a previous school. She described the observations of this new employee in the following interview excerpt:

> She came in and very quickly saw through what we had in data and everything else that was well supported, that it was a very rigorous, high-pressure program where [students] oftentimes felt like it was really a "slog" to get through and, while they emerged oftentimes by their senior year with their badge that said, you know, "I survived Cottesmore Academy of the Sacred Heart," it wasn't always a pretty journey along the way . . . families and kids have a lot of stress. (p 33)

The new division head hired by Nora convened a group of faculty to help craft a new vision for the advisory program and used faculty-development funds to compensate the educators for the summer work. This team collaborated to devise ways of ensuring students feel known through advisory and also developed a learning profile that would follow students throughout their years at the school. As means of supporting this program, Nora hired an assistant head whose part-time job it was to help support the administration by "making sure that those [learning profiles] change hands correctly and that kids are followed closely" (p. 34). Although a basic advisory program had been previously in place, Nora believes the new program is "a much, much stronger program,

and it's really grounded in that kind of sense that I think that the goals call us—to really know kids and know them well" (p. 34)

Students

Within the school setting, the student experience is naturally at the core of all activities. The Heads of school interviewed for this study spoke of student understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) as an important area of focus. According to Kathleen, an expectation exists for "the children [to] use the goals and criteria. They have student-led conferences, and they sometimes use the goals and criteria to talk about their own growth. They use the five goals and they look at the criteria" (p. 8). Chuck also spoke of the way students internalize and value *Goals and Criteria for Sacred Heart Schools in the United States,* stating, "Our kids really get it. . . . Part of the reason they do is not that they're memorizing the goals necessarily, but it's in the culture of the school" (p. 55). Chuck believes this of his students because of feedback they have given him following their graduation from his school. He explained,

> Our graduates go off to schools that are not faith based, whereas we are. They go to these . . . schools and yet they still talk about the value of the goals in their life and in their decision making. (p. 65)

Brady and Nora spoke of how *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) have been specifically invoked or considered when planning for the student experience and of how these experiences help students to internalize and understand the goals and criteria. Brady exemplified a project in which students researched how to use technology in a profound way that would have a significant impact on the lives of children with physical

differences. A teacher suggested the project, viewing it as a natural way to introduce Goal 2 in a meaningful, concrete manner to students. This goal is focused on academic rigor, and Goal 3 is focused on active service. Brady recounted the following story:

> We've been building hands with our 3-D printer in the geometry, algebra, computer, and engineering classes that we teach. They have just finished the first hand for a little boy . . . so this program allows us to get the measurements. The [students] then do all the calculations. There's a kit that you use as a kind of a basic structure and then it's modified to fit the particular kid's needs, and so he's going to get his first hand. He's coming up here in a week or 2 weeks to get it, and it'll be the first time that he's ever been able to grab anything. That's the kind of thing that just "bubbled up" from a teacher saying, "That's the right thing to do" because it combines our academic program with a real service to someone who needs it, and it's a fascinating challenge for the six or seven [students] who work on each project to figure out. (pp. 16–17)

Nora spoke of an exercise that she and the leadership team embarked upon to attempt to identify reasons students may not be attracted to their school. Goal 5, which focuses on personal growth in an atmosphere of wise freedom, became the focus of their conversations. There was a sense that some faculty had interpreted this goal to mean that students are called to take the full responsibility of learning upon themselves. Nora explained,

> Oftentimes, what we would hear at the upper school level that kids would not get something done, or they'd do poorly, and the teacher would say, "Well, I don't need to talk to [the student] or [the student's] parents. [The student is] old enough; that's personal growth. [The student] just needs to own that and take care of it." (p. 35)

The leadership team opined that the school needed to rethink this interpretation of Goal 5. As Nora stated,

> Personal growth is to understand the child so, again, same goal, different interpretation. . . . [Personal growth is] really understanding the child well and helping them grow. They're not going to get there by osmosis; they need adults to you know, intervene, and to scaffold that for them. They just don't become 13 and become moral. They don't just become 14 and become organized. They don't turn 15 and always make the best choices because they've been around us for [number deleted] years. (p. 35)

Another study participant spoke specifically about a program shift to better serve girls. When the school was considering what girls need to become leaders in the 21st century, the consensus was described by this interviewee in the following manner:

> They need a strong grounding in the kind of basic academic programs that allow them to have conversations that'll move the world forward, and we believe a lot of those conversations are going to be around science and around technology. (p. 25)

Invoking Goal 2, this head of schools went on to describe changes in school programming to address this need. He stated that, in addition to shifting the focus of some science, math, and technology classes,

> [W]e've added a leadership institute. We've added an institute of finance and economics. These are things that were informed by that sense of Goal 2 imbued with the history of Sacred Heart, which says, and we use the three words here, "Think, Lead, Change," so what do we have to know, how do we lead into the future if we want to change the world? I think those are the things that really underpin a lot of the decisions we've made, and we believe we pull those straight from the goals and criteria. (p. 26)

Summary of Findings

The interviewees reported numerous examples of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) influencing school decisions. Themes emerged that suggested certain types of decisions for which goals and criteria are particularly useful. These included (a) decisions made by Boards of Trustees, (b) budget-related decisions, (c) decisions on financial-aid policies, (d) action taken regarding the physical plants at the schools, (e) innovation affecting the stewardship of resources, and (f) decisions affecting school programs such as advisory and the daily schedule. While each head shared different points of view, all four were able to cite examples with ease.

Research Question 3

Research Question 3 asked, "Are all decisions made by the Heads of school handled in the same manner or are only particular types of decisions viewed as applicable to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)? The study's participants all held the strong belief that *Goals and Criteria for Sacred Heart Schools in the United States* is so deeply embedded within the culture of their schools that it manifests in all decisions—large and small. Kathleen commented that these decisions influenced by *Goals and Criteria for Sacred Heart Schools in the United States* are made on "every level, inclusive of classroom level. I mean Board, I mean curriculum and instructional decisions, and I think decisions made minute by minute by a teacher in the classroom, like how they're going to respond to a child" (p. 7). Chuck agreed that *Goals and Criteria for Sacred Heart Schools in the United States* underpin all decisions made at his school. He stated,

> They're wonderful goals, I think for any educator, in terms of developing personal growth in an atmosphere of wise freedom, building community, a love of intellectual ideals and awareness. With most decisions [the goals and criteria] are there in the background, and they just fit into the ideal, in my opinion, to building and developing the ideal school. (p. 46)

Chuck considers the goals and criteria most helpful when the school is faced with what he describes as "challenging decisions." He explained,

> When the awareness of using the goals stands out is when there are challenging decisions to make. They can be challenging on a personal level. I say personal, meaning staff. [The decisions] can also be challenging on a financial level, and that's when we become acutely aware. (p. 46)

Kathleen believes that any decision that affects students is sufficiently important to warrant consideration as to whether or not it supports the mission. She exemplified a

difficult decision to eliminate French from the curriculum, due to declining enrollment, as a decision requiring great care and thought, stating,

> You've got to ask it in a way that's really deeply connected to the mission, and sometimes it does require putting it on the table for a little while and praying over it and sometimes it doesn't. It's instantaneously obvious; like no, we're going to do the right thing. Whether it's, even if it's about [facilities]. We're going to do the right thing because the right thing is the Godly thing to do, and that's consistent with who we are, or making sure that we have the personnel and the time for the advisory or for the Goal 3 service trips. (
> p. 9)

Kathleen reported that prayer in decision making is a practice with her and her leadership team. She explained,

> So there's for sure a time when we'll say. . . "We can't make this decision right now. We're going to all go away from the table and pray." Sometimes, when it's mission versus money, I mean, those are the really big ones. Part of the discernment, part of the wisdom, is when people say, "Oh you have to do that because that's really important to the mission. . . . Some people misunderstand what the mission is. (p. 9)

In the process of these "really big" decisions, Kathleen has observed that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is always referenced, especially if a decision is taking a direction that may be counter to what this document calls schools to follow. She explained,

> If there's a moment where we sort of veer here or veer here in our conversation, somebody in the conversation—and it doesn't always have to be me—will redirect the conversation . . . and following up with saying the goals and criteria insist that we do [the right thing]. The mission of the school insists that we do that, and it's not [always] me saying it in the decision-making process. (p. 14)

Reflecting upon when *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is considered in the context of decision making, Nora commented,

> I'd like to believe that they were always a part of everything. I'm not going to kid you; I don't know that I pull them out every meeting and read them and say, "Now are we going to make this decision based on this?" But I do think that every

> department, when they make changes or decisions, weighs them against the goals and criteria. (p. 29)

Strategic Planning and the Desired Outcome

Kathleen and Brady addressed connections they have observed between *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) and their strategic plans. Strategic planning affects all levels of a school and many significant decisions. In her first interview, Kathleen reported that some Sacred Heart schools write their strategic plans with items mapped to specific goals or criteria. This was not something she implemented in recent strategic planning, but Kathleen went back to it with goals and criteria in mind. She found that "they were all there. I mean you could see that the strategic directions were addressing particular criteria within particular goals or ensuring that particular goals were being lived" (p. 13).

In her follow-up interview, Kathleen expressed an even stronger confidence that the goals and criteria are a collectively integral facet of the strategic plan of her school. She possesses this confidence because the SHCOG action plan of the school informed the strategic plan, and the SHCOG process is inherently tied to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). She stated,

> In a very specifically orchestrated manner, those action-plan items flow into the strategic plan and absolutely are a very formal way of using the goals and criteria to make decisions about how we operate as a school on, sometimes it's a board level, sometimes it's an administrative level, sometimes it's a teacher level. (p. 58)

Brady also perceives a direct connection between *Goals and Criteria for Sacred Heart Schools in the United States* and strategic planning; however, he did not link this pivotal

document to the SHCOG process. He stated, "We're starting a new strategic plan so . . . the goals and criteria are fitted prominently in that" (p. 16).

In the context of weighing daily school decisions with the overarching mission of the school, Kathleen spoke of the importance of keeping the "end game" in mind, as reflected in the following interview excerpt:

> We've got to figure this out so that we can have these Goal 3 projects in the schedule, and we've got to figure it out so that we can have time for advisory in the schedule, and we've got to help people understand what kind of deep educational thinking needs to be engaged in, so it's not about getting through all of this material; it's about learning how to be thinkers, and how do we do that? So . . . it's organic, with an end game. I mean, we've got our eye on the end game, and I think what's purposeful is the education to what the end game is. That's intentional and purposeful and consistent and conscientious so that the decision-making conversations always have the end game in mind, and if they don't, if it isn't articulated, it's always assumed, but it makes decision making easier when you know what the end is supposed to be, and I think that's where some people get caught in decisions. Perhaps they waffle in the decision because they don't know what the end game is, but if you've got your eye on that's what we want, it's easier to figure out. (p. 10)

Nora also spoke of the importance of remembering "the bigger picture," helping to form youth. She stated,

> It's not going to be, you know, this perfectly finished product when [the students] leave. They are a "work in progress," and we're charged with helping them make progress, but to get a kid out of middle school and expect that they're going to just do all these things, that they're going to come and see you when they're struggling, not always; some will. Some will hide and not look for you, and it's not that they, they don't know how to live Goal 5; you need to help them live Goal 5. (p. 36)

Crisis Leadership

Nora described her experiences reaching for *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when she was called to lead in a crisis situation. She was faced with many challenges, and she used her understanding of the *Goals and Criteria for Sacred Heart Schools in the United*

States to maintain her focus on the ultimate needs of the school, which were to survive while still operating as the Sacred Heart school it is called to emulate. This was a difficult time for both Nora and the school community. She recounted her experience in the following manner:

> I'm looking at [*Goals and Criteria for Sacred Heart Schools in the United States*], thinking about this. I think most people would say that I don't pull punches. I tell it like it is, and you may not like the way I think it is, but you're going to know where I stand, and so I think coming off of a [previous Head] that was very pastoral and very focused on the warmth and the building of the relationship and maybe a little less of the business side, and I came in a tough situation, like I said, with enrollment, finances, everything else, and I probably could have spent more time saying to people, "Please don't worry. There are some things I've got to do," especially to faculty. I did, at one point, say to [faculty], "Really, if you feel like I've neglected you, it's because you were where the least of my worries were." I had a business office that needed to be refit, completely redone, an advancement office that needed to be redone, an admissions office that needed to be redone. . . . We'd been at a high of 552 students; we were down to 450 maybe, and with a projection that it was going to continue to drop. You're like, "holy cow" folks, we've got to first of all get all the people that support faculty [who are] capable, incredible, and then we've got to swoop in and say, "What can we do as a school to make sure that we have a school?" (
> pp. 28–29)

Summary of Findings

The data reported by the study participants in this research suggest that they consider all decisions that affect students or the mission of the school to be important; hence, *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is appropriate to consider at all levels. In reviewing the interview transcripts, certain themes emerged that suggested certain types of decision making that require consideration of *Goals and Criteria for Sacred Heart Schools in the United States.* These include (a) strategic planning; (b) long-term student outcomes, or the "end game"; and (c) leadership in a time of crisis.

Research Question 4

Research Question 4 asked, "In what way do Heads of school render decisions affecting the Network of Sacred Heart Schools (e.g., consistent procedures, a checklist or template, and/or other individuals involved in the decision-making process)?"

Consistent Decision-Making Procedures

The four Heads of schools interviewed did not identify any consistent, formal, decision-making procedures followed within their respective schools that are used for all decision making. However, three of the four interviewees were able to identify a personal process they use when faced with a decision and the general practices they implemented with their leadership teams. The heads were also able to point to times when they employed more formal processes for certain decision-making exercises. A common element ran through all of the study interviews that indicated the four participating Heads of school do not seek expedient solutions; they take the time necessary to make the best decision for their respective schools.

Individual

When asked how he, as head of school, approaches decision making, Brady identified three "cuts" that he takes before solidifying a decision. He explained that he assesses what he referred to as the "agony level" before even entering into his decision-making process, stating, "Depending on the particular issue, the agony level goes up or down, you know, and the agony will be for me" (p. 20). His first consideration is from a pastoral viewpoint. He asks himself, "Am I really taking care of the person in front of me? Have I done my best to pastorally consider the person or the situation?" (p. 20). Brady then described the "second cut," which involves asking himself, "What are all the

kind of legal, financial implications?" (p. 20). Brady described his "third cut" in the following manner:

> I just try to find the time to be a little bit quiet with it, you know, and pray over it. Not from the viewpoint of, like, "Dear God, make . . . what's the right answer?" Or the other side of it might be, "Oh God, please don't let me do any harm," you know? But it's more like, all right, offer this up as just what is the right thing to do? (p. 20)

Brady described his process as "kind of a 'zigzag' line that makes the business types either on your admin team or the Board nervous. They want straight-line decisions, but in a setting like this, it's almost never straight line" (pp. 20–21). Brady recognizes that his community needs to have access to him following a big decision, so he makes himself available to everyone—parents and employees. He explained,

> If there's a really big thing that happens, I'll have an all-school meeting and talk about it. I also will schedule at least once every semester, three informal meetings where I say, "Now I'm going to be in the parlor at 3 o'clock. Please stop by just so we can chat about any questions you have." (p. 20)

When asked about her personal decision-making process, Nora reflected on her style and how that can be challenging within her school community. She commented,

> I would say that my style is to be always focused on the solution. Less about blame, more about, like, how do we continuously improve? How do we make things better? I'm sure I've made decisions without including the whole crowd and, at times, have had people say, "I should have been a part of that decision" and the only time I feel bad is when I think, "Oh, you probably should have and I just blew that. I just missed it." (p. 39)

In order to mitigate these missed opportunities, Nora expressed that she attempts to be clear and direct with regard to the roles of others in the decision-making process. She explained,

> I try . . . to let people know when I'm asking for their input and when I'm giving them decision-making power because, at the end of the day, some decisions just have to be made, and we're not a Quaker school. We don't have total consensus, and I can't operate like that. That's not my style, my personality, and it's not really, I would say at this point in the school's history, not what the school needs.

> It needs to be more nimble and, frankly, benign dictatorships in crises really work well. (p. 39)

The interview response from Chuck regarding his individual process in the midst of decision making revealed an active engagement with *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). He stated,

> I think, as I'm formulating the direction of the decision, then I do look more inwardly. I look to make sure it's consistent with the mission, with the goals and criteria. If there's any sort of questioning, or if I know it's a decision that I'm going to have to . . . explain it to others who will question, then I will go back and get the wording right, so I'll flip through the *Goals and Criteria* [*for Sacred Heart Schools in the United States*]. (p. 54)

Beyond spending time with the actual *Goals and Criteria for Sacred Heart Schools in the United States* document, Chuck also indicated that he seeks dialogue with members of the leadership team. He identified these conversations in the following statement as a component of his decision-making process: "The other process that I use is I will talk with various members of the leadership team, of my administrative team, sometimes the entire team" (p. 54). Some instances called for full-team communication; however, in those involving a student or a department-specific issue, Chuck may meet with only a few members of the team, as he explained in the following interview dialogue: "If it's dealing with a student or a faculty member, I'll talk to the division head and they'll do the same. They'll sit with me and say, 'Okay, well, this is consistent with our mission, with the goals, etc.'" (p. 54).

Kathleen did not comment extensively on the question of a personal process during decision making, although she did characterize her process as "definitely more organic," stating, "I am not an organizational theorist. I probably wouldn't even be able to describe to you some of what those formal processes would be" (p. 8). Kathleen

believes that, within the context of decision making and leading, her prayer life is her source of strength. She commented, "I think the thing that makes me good as a leader in a Sacred Heart school is my own prayer life and being interiorly connected and getting the mission so deeply." (p. 9).

Team

In answering an interview question asking whether she and her leadership team use a process when making a decision, Kathleen responded,

> We always invoke a moment of, it's not decision making; there are things that we discern, and by that I mean we do pray about things. We'll make our lists of pros and cons and have healthy conversations where we'll make sure we have a fair number of people at the table. (p. 8)

Throughout the interview session with Kathleen, the term *organic* emerged several times as a possible descriptor for the ways in which she and her team engage in decision making. When reflecting on how she and her team arrive at a final decision, Kathleen stated that there are practices they employ, especially when a particular decision will affect the budget, to ensure accurate data are gathered. She wanted to clearly communicate that her school applies rigor, even though the ultimate decision may appear more organic in nature. She explained,

> We will certainly engage in very rigorous data gathering, and very rigorous, even modeling at times, as we look at a decision; for example, on tuition levels or decisions about whether or not we're going to engage in a capital campaign, or a decision about what the campaign entails where there's data gathering [or] information gathering, but some of the information is also information about opinions, things of that nature, but there's also projecting forward into the future and doing some modeling about various things so, when I say organic, it's not like we don't do that intellectual heavy lifting. (pp. 8–9)

In her study interview, Nora commented, "We did an entire retreat with a person who does kind of team building with executive leadership teams, and we've learned a lot of techniques for, I would say, decision making" (p. 37). The process Nora learned is

known as the carousel approach. It appears to be a formal approach, but not a process to be used for all school decisions. After a water pipe broke at her school while several top leaders, including Nora, were out of the building, Nora and her team used the carousel process to debrief and plan for better responses in the future. She described this meeting in the following interview excerpt:

> We do, oftentimes, the carousel approach, so we put these big pieces of paper around and we said what went well, what were our challenges, and then the last one was kind of in a question format, which said, "What if we (blank)," so you have to put in a verb. "What if we created, what if we built, what if we followed," and then you end it. So one of the things was, "What if we had an agreed-upon channel for the walkie-talkies because there's confusion." "What if we had a folder that we left outside, in case, with [a list of] who's in charge next if you three are gone?" "Is it clear who's next in charge and who's supposed to be pulling the team together and all?" So it was really lovely because there are oftentimes . . . in my group, I have very strong personalities with lots of experience who are right, and so it gives them an opportunity to get what they think down on paper, but they're not drowning out everybody else. Everybody gets a chance to write something. (p. 37)

Nora went on to describe the steps they took and the time spent in the following manner:

> They have to do it in their small groups for like 10 or 15 minutes, then we shift, so we had four people answering the first one, four the second, four the third question. Then in 5 minutes, we shift and we do it again. So then, when we're all done, if you have agreed with anything anybody's written, you just put a check mark by it. If you have a qualifier, you can add that. (p. 38)

Nora explained that this process allowed her team to focus on the issue at hand and less on blaming or looking for who should have done something different. Rather, it became something they owned as a community and it allowed them to focus on solutions rather than blame.

When reflecting on his own decision-making process, Chuck described how his team engages in conversations before reaching decisions. He was hesitant to say there is a specific process other than focus on the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). He believes in a

culture of ongoing consideration and reflection on *Goals and Criteria for Sacred Heart Schools in the United States* to more easily make clear decisions. He stated,

> If there's an ongoing process at the school of reflection and reminders about the goals and criteria, it actually does make the decision making easier because everyone has a stronger chance of understanding why certain decisions are made or why we do what we do. It's much more sort of a global thing. (p. 51)

Brady did not identify any process used by his leadership team; however, he did speak to the various styles he encounters when called upon to make a decision. He believes in employing a consultative style; consequently, he finds himself navigating between a variety of approaches and perspectives. This has revealed to him that challenges exist on both sides—the side of those who believe the decision is clear and there should be no questions, and the side of those who may not feel prepared to ever fully commit to a decision. Brady perceives his role as Head to include finding balance. He explained.

> You're caught in that Scylla and Charybdis "Let's discern and consult until we drop dead," and on the other end of that continuum, "Why are you even thinking about this? This is the decision!" So [as Head] you've got to find the right path between those two. (p. 21)

Checklists and Templates

The Heads of school participating in this study were fairly unified in their answer to the question of whether they employ a template or checklist when making decisions. It was evident that checklists are used on occasion, but not necessarily as part of a decision-making process. Throughout the interviews, a theme emerged that suggested a resistance to any form of codifying for *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005).

Brady was direct in stating, "The goals and criteria are always there, but it's not like you do a checklist" (p. 15). Kathleen agreed, reporting that no decision-making

matrix of any type was implemented within her school; however, she acknowledged that a great amount of intentionality and thoughtfulness surrounding *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) was exerted in their decision making. She stated,

> [The goals and criteria are] riddled throughout the decision-making process as we're doing things like creating the timeframe in which all of this is happening, ensuring that Goal 1 is represented, and Goal 2 is represented and Goal 3 is represented, and Goal 4 is represented, and Goal 5 is represented in that, and ensuring on the Board level that we're supporting Goal 1 financial, we're supporting Goal 2 financial, and we're supporting Goal 3 financial, that all of that is . . . done as well. I would say we talk about the goals here, but we don't have a methodical matrix to ensure that we're doing that here. (p. 14)

Chuck echoed this sentiment, stating, "I don't have [a] checklist or go through and see which [goal] and criteria is going to help me with this or that" (p. 49). Nora responded to this question in the following manner:

> I wish that I could say to you as I read your questions that the goals and criteria are read before we make any decision or that they're read even at the beginning of every meeting because they're not. I mean, I'm just going to be honest with you; they're not, but having said that, we do call back to them. We do talk about, you know, what are we here to do. (p. 41)

Other Uses

Chuck responded in his study interview that his leadership team does use checklists; however, not for decision making. He stated, "A couple of years ago, I had my entire admin team read Gawande's Checklist Manifesto, and we created certain checklists" (p. 51). The purpose of these checklists was to capture steps for major events such as graduation or the beginning of the year. This helps the administrators maintain consistency from year to year, but the checklists are not used for purposes of decision making.

Nora described an occasion when she used a checklist for organizational purposes, but not for making a decision. During the most recent SHCOG process, her team created a chart to collect feedback, which developed into a checklist of responsibilities. While it was effective and helpful to use the chart or checklist, risks were involved surrounding how some school-community members viewed this approach. Some viewed it as not conducive to the "spirit" of SHCOG. Nora reported, "We did our SHCOG process and we created, and this would be my style; we created a chart. We put every single thing that people suggested. We talked about who is responsible. We talked about what's the time line" (p. 39). The risk, as perceived by Nora, was that some at the school view SHCOG as a more intuitive process, one that is not served by a checklist. She stated

> I know there are people who would say, "That's not the spirit of SHCOG. SHCOG is about understanding [or] just intuiting in your heart and in your soul." This is what people want and just the living of that. . . . Somebody who came from maybe the time when only nuns were here, would look at that checklist and say, "You've got to be kidding me." The nuns would have just looked at [the SHCOG feedback] and said, "Oh, okay, we'll listen better" [but for me] I've got a checklist. (p. 39)

While Nora recognized that a checklist may be uncomfortable for some individuals, she believes that the benefits are sufficiently compelling to pursue the creation of a checklist for their SHCOG process. She commented,

> I want to make sure it gets done. I'm more of a checklist [person]. Like, okay, if you want us to have better relationships, what are the things that will help us get better relationships? Then, let's make sure we're doing those things. Let's create some vehicle by which we know we're holding ourselves accountable to doing those things. (pp. 39–40)

Nora acknowledged that, while there are efficiencies and good information that emerge from applying checklists, the checklist alone does not solve issues affecting people. She explained,

> I'm not saying that necessarily you could check off the box that the person who brought forth in SHCOG the issue of community is going to say, "Oh, now I feel community." That's the problem with the checklist. It's that I can do what you've told me to do, and you can still feel like you're not being heard. You can still feel like this is not a community to you. (p. 40)

Nora continued her interview comments with some of her challenges as a leader in a school that is more accustomed to affective leadership. She stated,

> That's the affective part that I think challenges me as a leader because I'm somebody that thrives on relationship building like this [one-on-one], not to masses, and so masses of people will look at me and say, "She's a driver, she's goal focused. She's doesn't care about the individual. She just cares about getting the job done." (p. 40)

Nora articulated with emotion her description of her leadership style in the following interview excerpt:

> But if you know me on a one-to-one basis, you'll say, "Wow, she's pretty warm. She cares about me; she listens." When you have time, you can do a lot of that. When you have no time, you do what you have to do and then the perception is "There's the checklist girl." So it is that tension for me all the time because I would love for people to look at me and say, "Isn't she like [her predecessor]? She's so pastoral. She loves everybody. She's so warm. She's . . . in everybody's classroom. She remembers everybody's birthday perfectly. She's just… she knows everybody's name." And I'm, like, "Okay, that's going to take me 10 years to get there" because I'm the get-the-job-done girl, you know, and Sacred Heart schools are about those relationship-building people, so I just keep saying, "Well, I'm working on it and hopefully, over time, people will see me differently than they saw me at the beginning. That's my hope. (p. 40)

Resistance to Codifying

Kathleen spoke directly to the concern that any attempt to "make a God of the goals" would damage their strength, especially because, as she sees it, "The Goals are structured to help us get to God" (p. 5). Kathleen sees a risk in allowing *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to become unexamined words; consequently, she invests time at the beginning of each year to finding ways to rearticulate the goals. She stated,

> I utilize this time at the beginning of the year to try to say things in a fresh way, to try to get at some aspect of living their mission, so that it's not just using the phrase, *goals and criteria,* which then becomes this trite, meaningless phrase that everybody uses. Oh yeah, it makes us different, goals and criteria. Well, what does that mean? (p. 5)

Kathleen spends a great deal of her summers reflecting on how to refresh the engagement of her school community with *Goals and Criteria for Sacred Heart Schools in the United States*. It is during this exercise that she is the most explicit about "utilizing the goals in a very formal way" (p. 5). She is determined that they never become "just words" because then the risk is that "they're rendered meaningless." She further stated,

> I know that happens sometimes, that you can use a phrase so much that you almost have to "shake it up" and use fresh words to help people understand what are you really trying to get at underneath that? [Otherwise] even people who've been here for a while, sometimes can just have a superficial understanding of what is really being asked by the goals. (p. 6).

Brady also spoke of the importance of giving *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) frequent and active thought. He cautioned,

> Well, you know if you don't really think about them a lot, you do that to your peril, right? You know you won't survive long unless you really do kind of mull over them a lot and try to keep them fresh in your own head" (p. 21).

Brady suggested that, if *Goals and Criteria for Sacred Heart Schools in the United States* were ever allowed to become a catechism, the Sacred Heart leader would be in trouble. He stated, "They [the goals and criteria] can't be a set of rules that you recite. They've got to form some way of looking at things, rather than a framework, if you will" (p. 21).

Challenged Decisions

In exploring the notion that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) should not be made into God or a catechism, a theme emerged in three of the four study interviews that

individuals exist within Sacred Heart schools who have such an established and internalized understanding of the goals, that they become resistant to considering any other interpretations or considerations of their meaning. Kathleen and Chuck used the term "thrown" to describe the challenge of expressing just what the goals mean. Kathleen provided the following description of her experience with some individuals within her school when she decided that French was no longer viable at all academic levels:

> But there's been things that have been thrown in my face; like people will say, "What do you mean you're not teaching French at that level anymore? and "That's so important to the mission." Well, I think that's a misunderstanding of the mission. Helping the children become global citizens is important. Teaching a language that they're not signing up for, and spending an inordinate amount of money for a class with two kids, is fiscal irresponsibility. (p. 9)

Chuck also experienced a strong reaction to a decision and observed, "Sometimes the language of the goals can be randomly, I'll say, "cherry picked" and thrown back in a decision, and I think it's really important to have a deep understanding of them" (p. 47). This idea of the goals being "thrown" at Heads seemed to stem from use of the phrase, "That's not Sacred Heart." Chuck recounted an experience with an employee who needed counsel due to lack of performance. Even though other teachers had complained about this individual, Chuck recalled that, when it became known that he had released the employee, "some of the same people that were complaining (we refer to it in the shorthand of the 'pity party') came out. [They asked] 'Oh, how could that happen? Oh, what's going to happen?' and 'How Sacred Heart was it?'" (p. 47). Chuck was certain he had made the right decision. He spoke with a fellow Head who was also a Religious within a Sacred Heart school and extended helpful advice. Chuck recalled,

> She said, 'Don't let that get to you because you also have to have that compassion and that care for the students, and if you don't have the right teacher in place then . . . you know, who are we really here for?'" (p. 47)

Nora also described experiences within her school community when members have questioned whether a decision she has made is "Sacred Heart." She believes that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) can be lived and observed in various ways, according to the needs of the respective school. As a lay leader, it was a challenge for Nora to determine how to best convey to her school community, who had previously been led by a Religious of Sacred Heart, just how much she values the goals and criteria. She explained,

> I believe that the beauty of the goals is that they're broad enough that lots of leadership styles and teaching styles and learning styles can fit under this, and faiths can fit under this umbrella". . . . Yet, oftentimes, people will say, when a difficult decision is made, "Oh, that's not very Sacred Heart," and it's like, well, but Sacred Heart means a lot of different things to a lot of different people. (p. 28)

Involvement of Others

The interview participants in this study each described how and when they involve others when making decisions. Specifically, they spoke of how they use their administrative or leadership teams in the decision-making process. The involvement of team members during the SHCOG process emerged, as well as the view of the Network of Sacred Heart Schools as a resource for better understanding of how to use the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) during decision making.

Nora expressed the importance of creating opportunities for individuals other than administrators to provide input into decisions. She began her tenure as head of school in a tumultuous time and was forced to resort to "top-down" leadership out of necessity. As

the situation stabilized, she took the opportunity to form committees and assign meaningful tasks to shift the programmatic direction of the school. She recalled, "I'm saying to a professional-development committee, 'What do you think is the next step for us? [For] people that are interested in diversity training, what is the next step for us? What do you think we should do?'" (p. 39). Nora suffered the effects of individuals within the school to feel heard; however, she is now able to delegate responsibility to others. Each of the Heads of school interviewed in this study indicated healthy, collaborative relationships with their respective board of trustees. This suggests that they welcome the involvement of Board leadership when making decisions appropriate to that leadership level.

Leadership Teams

Chuck described his leadership team as functioning as his "checklist." He stated,

> I don't really have a checklist. Yes, I absolutely involve others. That's my checklist—other people who I know value, contemplate, and use the [*Goals and Criteria for Sacred Heart Schools in the United States*] in their decision making, which is really the leadership team here. (p. 56)

Kathleen described conversations with her leadership team that encompassed issues such as programming, scheduling, curriculum, budget, and personnel. During all such dialogue, *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is invoked as an integral component in decision making. She explained that it is typical in this type of team-level discussion to have one individual emphasize the larger purpose of the school, as reflected in the following interview excerpt:

> We always will, in the end, look back and say, "We've got five goals; we don't just have one goal and that one goal is not just Goal 2." Given that we have five goals, and given that this is our niche, this is not only our niche in the market—

> that sounds crass—but it is our mission, it is our purpose, it is our gift to the world. Frankly then, this all has to happen and let's figure out how to do it. (p. 4)

In response to the question of how or when others are involved in decision making, Brady stated, "I try to be very consultative, so I never try to make a decision on my own because I just won't have the same kind of objectivity about it" (p. 17). He explained that, in the past few years, there have been some typical issues concerning challenges with a student or with faculty and he has involved his senior administration team with each instance. He further commented,

> I've tended to maybe err a little bit more on the side of an open discussion with the senior admin team, and each person has a very strong opinion once you do that, so you kind of unleash another dynamic once you move in the direction of open consultation. (p. 17)

The "downside" to consultative leadership, as perceived by Brady, is that there are times when team members do not feel heard because Brady opted to go in a direction contrary to their opinions. He has found the need to help others understand that such a decision is not a rejection of any particular view. He does believe, however, that his team is aligned on their commitment to the school and stated, "I think, ultimately, everyone around the table knows we've got this bigger mission to serve, but everyone's going to have a different opinion of how to do that" (p. 18).

With regard to involving others in decision making, Nora acknowledged that she is improving in terms of ensuring that the right people are in the room and that the decision is communicated outside the room. She perceives self-improvement in "trying to be very clear on what is the decision, who gets to make the decision, who gets to give input on the decision, and then whose responsibility it is to communicate the decision" (p. 41). When asked to describe how she works with her administrative team during decision making, Nora used the example of establishing the budget and how she ensures

the right people are involved in the decision and that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) are considered. She stated,

> Who's at the table when we talk about budget? We may start the budget with two or three people, then we start to bring more and more people in, but at the end of the day, when you look at our budget, the part of the budget that faculty and staff, for example, have control over is about 5 to 10%. The rest of it is salary, upkeep, heating, cooling, so you want to give control to the degree to which they have control. I mean, faculty don't really have a lot of control over how much heat costs us, but my CFO has a lot of control over [it], if she's valuing the goals about bidding it out, getting good prices, making sure that we're conserving, etc. That has to be at the forefront. (p. 41)

Nora and her team have observed that a critical step in making any major decision is to ensure that those who need to be involved are included in the dialogue. She described a consistent practice in the following manner:

> Constantly trying to remind ourselves [and asking], "Do we have all the right people in the room" when we're getting ready to make a big decision, I think [that] is the first step, and then, if we do that, then we usually probably will do all right. We'll figure out what methodology works best to get to it. It's just being careful that all the right people are there. (p. 42)

Sacred Heart Commission on Goals

Several of the participants in this study recognize the SHCOG process as a way of inviting other voices into the planning process, which affects decisions made at the schools. During the follow-up phone interview, Kathleen remarked that, when she read her transcript, she seemed to be "waffling on saying our process isn't a formal process for using the goals and criteria to make decisions" (p. 58). She went on to clarify, "In fact, the SHCOG process does move us into actionable decisions that clearly call us to live the goals and criteria more deeply" (p. 58).

Kathleen described how the SHCOG process unfolds in the following interview comments:

> After we go through a yearlong reflection on: Are we living [*Goals and Criteria for Sacred Heart Schools in the United States Goals and Criteria*] deeply? How can we live it more deeply? What do we need to do to live this goal or these criteria more [and] more broadly? Which is all facilitated by every group that's organized to do that—a named leadership group at the school—then we have a document that's written that is reflective of all of our conversations about each goal and how we're living them well and what we might do to live them more well. (p. 58)

The next step in the SHCOG process is to welcome a team of other Sacred Heart educators, which Kathleen described in the following manner:

> We have a visit from educators at the Sacred Heart from other schools around the network who've read our self-study document, who come spend time with us, talk to the various constituency groups and then write a reflection back to us saying, "We heard strongly that, yes, you are living the goals and criteria well in these areas and we did hear strongly and you captured it in your self-study, that, yes, you need to work on doing the following things: You need to grow in living the goals and criteria in these ways," and so . . . there are some commendations relative to the goals and criteria and some recommendations relative to the goals and criteria. (p. 58)

The final step involves the creation of an action plan, as Kathleen described in the following interview excerpt:

> Then, after that, there is an action plan committee named who then use the self-study, use the reflection, and write an action plan to specifically address the recommendations of both the self-study and the reflection in order to deepen the living of the goals and criteria. (p. 58)

Nora provided insight in her study interview regarding the helpful nature of the SHCOG process in creating an atmosphere that encourages decisions made with consideration to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). She recounted,

> As we went through the SHCOG process, the ones that we had to look at most closely were [Goals] 4 and 5, building community in a time of really significant change and personal growth in an atmosphere of wise freedom. Were we really giving enough voice to the people that were in the building, you know, as new people were coming in? Were their voices valued? And so we've really tried hard to take a look at that and analyze, could we do a better job? (p. 27)

Nora found comfort in the fact that the last SHCOG under the previous leadership yielded many of the same concerns. She reflected, "Communication always seems to be the bane of any large organization or company's concern. Building community is always a tough thing to do. The bigger you get, the harder it is. So [you] just keep working at it" (p. 40).

Brady would welcome an even deeper engagement with the SHCOG and would find a more objective kind of study and feedback even more helpful in the planning and action work for his school, as reflected in his following interview comments:

> When SHCOG comes in, the process is so . . . self-referential. It's almost a completely self-referential process. You look at the goals and criteria, you tell us how you think you're meeting them, and then we'll comment on that. There's no outside point of reference there at all to kind of give you an objective standard or read on what you're doing or what you should be doing. (p. 23)

School Network

The Network of Sacred Heart Schools is not directly involved with decision making; however, it is an influence to the work of the Heads, Boards, and leadership teams. Chuck described in his interview the extensive amount of time employees have spent on Network activities that have helped to bring greater understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) and how the content of the document is active in the daily life of the school. He cited the SHCOG process and the annual conference in St. Charles, which is focused on the heritage and history of Sacred Heart. According to Chuck, these experiences have observable results. He stated,

> What I love seeing is how more and more faculty and administrators every year, more of them got it, they got the value of the goals and criteria in terms of decision making, I would say broad decision making, whether it's how they organize their classrooms [or] how they set their expectations. (pp. 54–55)

Chuck attributed this internalizing of *Goals and Criteria for Sacred Heart Schools in the United States* to an increase in individuals who reference specific goals and criteria when they describe a decision or choice they have made. Chuck stated, "the Network itself is a resource," (p. 55) and he spoke of his appreciation of being part of "a community of educators that believe in the same thing and have actually taken the time and the effort to identify the goals and criteria. It's a great organization" (p. 56).

Brady spoke of the annual meetings with other Heads of school within the Network of Sacred Heart Schools. When asked if this forum was ever a venue within which discussion encompassed how *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) was used or accessed in leadership practices, he said that this was not the case. Brady believes this would not be welcome among the Heads, and he, in particular, is not interested in hearing how others may use the document. He does not want to create an atmosphere within which the goals become a "kind of . . . catechism . . . or become prescriptive" (p. 22). Where Brady gains benefit from working with other Heads within the Network is in discussing how they keep the goals alive and present through the struggle of leadership. His leadership practice is strengthened through the mutual feedback. Nora also spoke positively about learning how other Heads live out the mission. She commented,

> We're all struggling to be true to [*Goals and Criteria for Sacred Heart Schools in the United States*], but we'll be true to them in different ways. I do think they definitely underpin everything every Head I know that works in the Network does. (p. 30)

Summary of Findings

The data gathered in the study interviews suggest that the study participants are intentional in the ways they approach decision making. While they stated that there were

no consistent procedures applied during decision making, they each spoke to consistent processes they follow individually when faced with scenarios requiring critical decisions. Three out of the four participants articulated general processes they follow with their leadership teams in appropriate situations.

With regard to the use of a checklist or template during decision making, the study participants were adamant in their negative responses. None of the Heads of school interviewed use a checklist or matrix for decision making. While two had employed checklists in particular situations, it was not within the context of decision making. All of the participants strongly rejected any implication that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) could ever be codified in such a way as to become a checklist or template.

A common appreciation among the interviewees was evident for the inherent flexibility in interpreting *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). A common mistrust for any tendency to identify one correct way to live or interpret any segment of *Goals and Criteria for Sacred Heart Schools in the United States* was also apparent, especially when considering the significant decisions they are trusted to make within their respective schools. In fact, a theme emerged from three of the four interviews that suggests the very idea of a specific way of "being sacred Heart" has created division and pain in the schools.

All four of the study participants expressed an openness to involving others in decision making. They each spoke of how they work with their leadership teams through significant decisions, especially those decisions that would directly affect a particular

administrator. They also indicated that the SHCOG process and membership in the Network of Sacred Heart Schools provides opportunities for the helpful involvement of others in creating environments that support decision making grounded in *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005).

Decision-Making Research

There is a long-standing tradition to engage in thoughtful reflection before making a decision among the Religious of the Sacred Heart that was initially established by St. Madeleine Sophie Barat. Kilroy (2000) published the Barat approach from a personal letter describing her process prior to making a decision. Barat confided, "I watch, I listen, I pray and ask others to pray" (p. 320). While the participants in this study reflected this type of thoughtful engagement with difficult decisions, none identified with any of the decision-making theorists described in the literature reviewed for this research (March, 1988; 1991; 1994, Lunenburg, 2010, Kahneman, 2011, or O'Sullivan, 2011), nor did they view this as a risk. Nora described the carousel system of collecting ideas, but it is clear that, when it comes to making a decision that affects the direction of the school or is connected to the identity of the school, she does not follow any particular theory or format.

While the interviewees in this study did not follow the views of any of the decision-making theorists reviewed, they described thoughtful processes that would seem to align with the Kahneman (2011) definition of System 2, or slow, thinking. Each of the participants described instances in which a quick decision was not appropriate, so they entered into an exercise of consideration or reflection, which resembles the cognitive

processes Kahneman described as occurring when humans engage System 2 thinking. However, because the interviewees were likely unaware of the described studies in decision making, or have not studied the research within the context of their own decision-making processes, it is possible that they may not have been engaging in the most optimal, research-based methods of making decisions.

Summary of Findings

The Heads of school interviewed for this study provided rich data for analysis. They were thoughtful and open in the interviews. They demonstrated, through their tone, gestures, and words, deep regard and appreciation for the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). Their strength of conviction in the Sacred Heart method of educating is inspiring. As leaders within their schools, they exhibited frustration with particular challenges; yet, they always conveyed empathy and concern for those who challenged their decisions. They were generous with their time and seemed pleased to have an opportunity to discuss their professional roles in service to their students and the Sacred Heart education mission. As a result of their willingness to contribute to this study, the descriptive data that emerged was rich, comprehensive, and insightful.

The four study participants were fairly aligned in their responses; however, in a few instances, only two or three of the interviewees commented directly on certain topics. With regard to the first research question asking how they use *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their schools, there was clear affirmation that the goals and criteria provide direction, inspiration, and support to these Heads of school. They

expressed with deep conviction that *Goals and Criteria for Sacred Heart Schools in the United States* permeates their respective school cultures so deeply that the document is implicit in all school decision making. They affirmed the importance of formation to mission at all levels, from the Board of Trustees to the administrators to the teachers to the students and their families, as a means of understanding and supporting decisions that reflect the goals and criteria of the Network of Sacred Heart Schools.

With regard to Research Question 2, all four study participants spoke positively of their relationships with their boards of trustees and their administrative teams. When asked to provide examples of times when *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) was used in making decisions, the stories they told illuminated and confirmed not only the manner in which each school embraces and lives the goals, but also provided numerous ways in which this document was utilized in all areas of school life: mission, personnel, facilities, curricular programs and budgets. With regard to Research Question 3, the participants were asked to reflect on any decisions that have called for application of *Goals and Criteria for Sacred Heart Schools in the United States.* They seemed challenged to arrive at any decision that would not, on some level, rely upon use of the document. Consequently, this particular question yielded the least data.

To address Research Question 4, the interviewees were asked to reflect upon the manner in which they make decisions and they were direct and clear in their responses. They clearly have individual processes they implement when tasked with making a final decision. In most cases, they could identify a general process they employ with their leadership teams. They felt strongly that there is no single way to live out or interpret

any of the goals and criteria; hence they do not apply them in any formalized manner such as a checklist or template. They absolutely involve others in decision making and value such input. In addition, they all utilized private and collective reflection and prayer.

The findings of this study resoundingly suggest that the Heads of school who participated hold *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) in high esteem and feel a profound responsibility to keep the tenets of this document at the forefront throughout their school communities. These are thoughtful leaders who are comfortable reflecting upon their practices and areas of strength. The anecdotes they contributed are illuminating and clearly exemplify the manner in which they honor the *Goals and Criteria for Sacred Heart Schools in the United States* in their decisions and practices within the schools entrusted to their care and authority.

CHAPTER V

CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS

Summary of the Study

Sacred Heart schools emerged from the mission of the Religious of the Sacred Heart. Because the education of youth is considered an integral facet of the mission of the Society of the Sacred Heart, the Network of Sacred Heart Schools is held to high standards. These standards are articulated within the *Goals and Criteria for Sacred Heart Schools in the United States* document (Society of the Sacred Heart, U.S. Province, 2005) and are recognized by all members of the Network as critical to living out the vision and mission of St. Madeleine Sophie Barat, founder of the Society. This qualitative study explored the perceptions of four Heads of school within the Network of Sacred Heart Schools in the United States and Canada. Through their stories captured in the research interviews, their application of the *Goals and Criteria for Sacred Heart Schools in the United States* during decision making, as well as the manner in which they engage in decision-making processes, were drawn.

No study prior to the current research had been conducted of the Sacred Heart Heads of school relative to their decision-making practices. This opportunity to explore how they engage in such practices held potential value for not only the Network of Sacred Heart Schools, but also other school systems rooted in a religious charism. Literature on the Catholic education mission from within the context of the Catholic Church was examined through a review of church documents and scholarly research on the interpretation and implementation of these documents. Literature on schools rooted in a religious charism and the role that charism plays within those schools were also

reviewed. The documented history of the Society of the Sacred Heart was examined in order to describe the importance of education in the lived mission. Studies of decision making and, specifically, decision making in schools were investigated.

The conceptual framework of this study was based upon three interlocking concepts: (a) recognition by the Catholic Church of the importance of a charism to the pastoral ministry of the church, specifically in relationship to Catholic education and religious charisms within schools, such as the Network of Sacred Heart Schools; (b) *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) as formal documentation of the characteristics of the Sacred Heart charism to perpetuate its principles; and (c) recognition by the Catholic Church that the mission of Catholic education is dependent upon school administrators as the primary decision makers of Sacred Heart schools.

The constructs of interviewing and data collection, as advanced by Kvale and Brinkmann (2009), were applied in this qualitative study. Participants were invited to engage in narrative storytelling, as outlined by Connelly and Clandinin (1988, 1990, 1999, 2006) and Clandinin and Connelly (2000), to illustrate the decision-making methods and practices they employed. Each participating head of school was interviewed for one hour on his or her campus in a location selected by each Head. All interviews were completed in the fall of 2014. Once the recorded interviews were transcribed and verified by the interviewees, half-hour follow-up interviews were conducted with each participant by telephone. These phone interviews were all conducted during December of 2014 and also transcribed. Approval was obtained from the four interviewees to use the data collected with the understanding that their words would be anonymized through

the use of pseudonyms and any identifying characteristics within the data would be "masked." The choice to conduct face-to-face interviews and follow-up interviews by telephone with only four Heads of school was guided by time and financial constraints on the part of the researcher. The small, but purposeful, sample size contributes to the limited scope of the this investigation.

The following research questions guided this study:

1. How do the Heads of school within the Network of Sacred Heart Schools in the United States apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their respective schools?
2. When have the Heads of school used *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) to render decisions?
3. Are all decisions made by the Heads of school handled in the same manner or are only particular types of decisions viewed as applicable to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005)?
4. In what way do Heads of school render decisions affecting the Network of Sacred Heart Schools (e.g., consistent procedures, a checklist or template, and/or other individuals involved in the decision-making process)?

Upon conclusion of the study interviews, the transcripts were reviewed to assess whether data were captured that would answer the research questions and determine the degree to which the Heads were in agreement or disagreement with their content. The data were

categorized by the research question(s) they addressed, which allowed themes to emerge evidencing that the majority of responses were in agreement with the content of the research questions.

Conclusions and Implications

The Heads of Sacred Heart schools interviewed for this study entered into the sessions in a willing and open manner. They spoke of a deep appreciation and high regard for *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). One participant, Chuck, commented,

> What I find on a regular basis [is that] the goals and criteria just reaffirm the decisions that administrators have to make and should make because they are the right ones to make, and that's where I find it a wonderful anchor. (p. 53).

When the study participants were asked how they apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) when making decisions for their respective schools, the similarity in their responses was remarkable. These educators believe that *Goals and Criteria for Sacred Heart Schools in the United States* is deeply embedded within their schools. They communicated that this depth of understanding is not accidental, and each of the interviewees recounted specific ways they have explicitly worked to develop understanding and formation around these goals. They all agreed that *Goals and Criteria for Sacred Heart Schools in the United States* is not used systematically as a means of generating or validating a prior decision. While they did offer examples of decisions that were grounded in a specific goal or criteria, the general consensus was that, rather than functioning as a surface-level template or checklist, the goals and criteria are deeply rooted in the Network of Sacred Heart and influence all considerations and decisions.

Leadership Application of the Goals and Criteria

The data gathered via the initial interviews and follow-up telephone sessions suggested several themes that reflect the ways the study participants believe the formation to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) is reflected or ensured within their respective schools. The clearest theme was related to the notion of mission. The term *mission* was used 87 times throughout the interview transcripts, which represents only a few more instances than uses of goals and criteria that appeared 93 times. The Heads use the term *mission* interchangeably with goals and criteria. The mission of the Society of the Sacred Heart is widely known and is articulated in the following manner: To make God's love visible in the heart of the world (see Appendix I). However, when the Heads of school use the term *mission,* they may not always be referring to the overarching mission of the Society of the Sacred Heart, but rather, to *Goals and Criteria for Sacred Heart Schools in the United States,* which was written to guide schools in the spirit of the articulated Society mission.

The first foundational principal within the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) states, "In the Goals and Criteria, the Society of the Sacred Heart defines the mission of the school as part of the Society's educational mission in the Catholic Church" (p. 5). It is inaccurate for the Heads of school to consider the goals and criteria as part of the mission; however, the term *mission* is used interchangeably with goals and criteria, so it may not fully reflect the intentions of the Religious of the Sacred Heart. Regardless of

the intended definition, when the interviewees used the term, it was used with respect and appreciation, as well as with a sense of responsibility.

Another theme that emerged under this idea of formation and foundational understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) was to consider the criteria as well as the larger scale goals. The study's participants spoke of valuing the specificity of the criteria and of appreciating the ways projects or plans are connected to a specific criterion. The criterion calling for clear, direct, open communication among adults within Sacred Heart schools resonated with two of the interviewees who spoke in depth about their experiences at their schools surrounding this criterion.

Other themes emerged surrounding formation and foundational understanding of *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) that included (a) reflection on the role of head of school as a public figure entrusted with articulation of *Goals and Criteria for Sacred Heart Schools in the United States,* (b) the helpful nature of physical representations of the goals to provide constant reminders to the school communities of their common focus, (c) the strength of a school culture imbued with *Goals and Criteria for Sacred Heart Schools in the United States*, and (d) the importance of hiring and retaining employees who embrace this focus and type of education. In particular, the practice within all four schools of creating ways to physically display or symbolically represent *Goals and Criteria for Sacred Heart Schools in the United States* within the school buildings illustrates Cook's (2015) finding that "effective Catholic schools use cultural icons as symbolic expressions

of their school's Catholic identity and specific charism and to feed the Catholic imagination" (p. 17).

With regard to Research Question 2, the study's participants recounted many examples of decisions made at their respective schools that they believe were influenced—explicitly or implicitly—by *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). Their stories related to decisions using *Goals and Criteria for Sacred Heart Schools in the United States* involved a wide variety of areas—the boards of trustees, budget, financial aid, facilities and physical plant, stewardship, school programs, and student discipline. The narratives reflected experiences that ranged from painful to triumphant, and each story illustrated thoughtful consideration, clarity of purpose, and commitment to *Goals and Criteria for Sacred Heart Schools in the United States* as a factor in the process. Each interviewee spoke of using *Goals and Criteria for Sacred Heart Schools in the United States* in many areas of school functioning involving students, faculty, staff, and Board members.

When asked whether they handle all decisions in the same manner, or if there are particular types of decisions for which they apply *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005), the four participating Heads of school agreed that *Goals and Criteria for Sacred Heart Schools in the United States* influences all decisions, either implicitly or explicitly. They believe that all types of decisions would be appropriate for consideration of the goals and criteria. An exploration of the differences between mission-based decisions and other decisions was planned in this study; however, the participants viewed all decisions as mission

based. This subject matter of the interviews prompted thoughtful responses on strategic planning and maintaining focus on the Sacred Heart education mission at all times (i.e., the "end game"). It also prompted reflection by Nora on how *Goals and Criteria for Sacred Heart Schools in the United States* is an integral facet of her leadership during a period of crisis. Therefore, there was no "cookie-cutter" approach to the manner in which the study participants applied *Goals and Criteria for Sacred Heart Schools in the United States.*

General Decision-Making Processes

The interview questions pertaining to Research Question 4 provoked impassioned discussion surrounding how the Heads of school do engage in decision making. The question explored whether the respondents (a) employ consistent procedures when making decisions, (b) use a checklist or template to support decision making, and (c) involve others when making decisions. The four interviewees described their own processes for decision making, which revealed thoughtful, prayerful leaders. The processes they engage with their teams seemed relatively consistent; however, this is due to their established practice rather than any intentional decision to follow a process. The processes described by each Head were reflective, practical, and productive, and they fit the management style of each respective leader.

The study participants demonstrated the highest amount of energy surrounding the question of whether they use templates or checklists in decision making. While the question did not directly state that *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) could function as a checklist, this was how several of the Heads interpreted the inquiry, and they were

adamant in their answers, which clearly reflected that the goals and criteria should not be used for that purpose. Concern was expressed that, to use *Goals and Criteria for Sacred Heart Schools in the United States* as a checklist, would perhaps turn the document into a "God or catechism" or, in some way, render it static. The four interviewees appreciated the universality and openness of *Goals and Criteria for Sacred Heart Schools in the United States,* as well as its flexibility, allowing schools to live out its tenets as the Heads of school deemed appropriate while always remaining recognizable as Sacred Heart institutions. In her study interview, Nora summarized this concept by stating,

> What I love about Sacred Heart is that Goal 1 is lived many ways in many schools and we're not all the same, but yet, when you go into Sacred Heart schools, you see evidence that those goals are critical to the life of the school. (p. 30)

Three out of four of the study participants reported being questioned on the "Sacred Heart" nature of a policy or decision. Their stories related to their reluctance to see *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) codified in any way such as a decision-making checklist or matrix. Within the context of these stories, two of the interviewees used the term *thrown* to describe the manner in which a decision was questioned as to whether it was grounded in Sacred Heart. *Thrown* is a visceral term and reflects the emotions of these scenarios. While Nora did not use the term, her story involved members of her school community who doubted the Sacred Heart nature of her leadership, which was a source of pain and disappointment for this leader.

The study participants were shaken by moments within which the goals themselves were called upon to question the devotion of the Heads to the overarching mission of their schools. The examples recounted by the interviewees affirm that they

are indeed introducing *Goals and Criteria for Sacred Heart Schools in the United States* to their communities. The fact that some employees feel familiar enough with the document to challenge their Heads of school actually illustrates that the Heads do present the goals to their school communities with frequency and in a manner that reflects their importance. The different opinions and interpretations of *Goals and Criteria for Sacred Heart Schools in the United States* among school employees suggests an opportunity for the school as a whole to reflect collaboratively on the meaning of the document within the context of their particular school.

To address another aspect of Research Question 4, the study participants were asked to reflect upon whether they involve others when making decisions. The answer was a resounding "yes" from all four respondents. They spoke of collaborative practices with their administrative teams and each expressed enjoying productive and collaborative relationships with their Boards. Consequently, they feel confident with decision making at the Board level. When considering the involvement of others, the Network of Sacred Heart Schools emerged as a helpful resource. While the Network is not directly involved in the majority of school-level decisions, it does provide formation and education opportunities to Heads of school. The summer program known as Roots That Give Us Wings was referenced as helpful. The Network-led SHCOG process, which is explicitly linked to *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) was highlighted in several interviews as a process yielding actions that translate into decisions regarding strategic planning and high-level planning. Findings from this study suggest that the Network and, specifically, SHCOG reflect the involvement of others in decision making within Sacred Heart schools.

A clear message emerged from the interviews conducted for this study: The Heads of school hold *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005) in high regard. They believe that the goals influence all aspects of their school cultures and that this is a result of their intentional formation work within their schools. While they agree that the goals do not serve as a template or checklist and may or may not be explicitly called during any particular decision, they believe that *Goals and Criteria for Sacred Heart Schools in the United States* implicitly drives decisions due to the depth of understanding and appreciation of the document among school leadership. *Goals and Criteria for Sacred Heart Schools in the United States* radiate through all elements of school life within the Sacred Heart Network.

Recommendations for the Network

It is recommended that the Network of Sacred Heart Schools work collaboratively to understand the cognitive science and current relevant research related to decision-making processes (March, Kahneman, Lunenburg, and O'Sullivan). The risk of leaving the decision-making processes of Sacred Heart Heads of school unexamined is that "the attentive System 2 [slow thinking] is who we think we are. System 2 articulates judgments and makes choices, but it often endorses or rationalizes ideas and feelings that were generated by System 1 [fast thinking]" (Kahneman, 2011, p. 415). It is possible that the heads of these schools are not making optimal decisions due to lack of awareness of common pitfalls identified by Kahneman (2011). According to Kahneman (2011), even when functioning in System 2, "we do not always think straight when we reason, and the

errors are not always due to intrusive and incorrect intuitions. Often we make mistakes because we (our System 2) do not know any better" (p. 415).

Considering the findings of Kahneman (2011), as well as those of Lunenburg (2010) and O'Sullivan (2011) who researched decision-making in schools, there is an opportunity for the Heads of school to study in a more formal manner how they make decisions. Further research could uncover whether the observations made by Lunenburg at the schools he studied are also manifest at Sacred Heart schools or if the recommendation of O'Sullivan to combine rational, arational, and collaborative decision-making methods would be welcomed by these school leaders. Because the Heads of Sacred Heart schools do not use this language (i.e., fast/slow thinking and System 1/System 2 decision making), a session on current decision-making theories, especially regarding research findings related to school settings, could benefit these leaders and increase their awareness of how they approach decision making.

The Network of the Sacred Heart Schools could create a session for Heads of school at their annual meeting within which these leaders could compare best practices related to how to respond to an employee challenging the Sacred Heart nature of the decisions they make. When the participants in this study described instances of being questioned in this manner, strong emotion emanated from their interview responses. Nora was one participant who experienced her vision for her school questioned as "not Sacred Heart." She described an instance of an employee speaking with others about elements of Goal 1 missing under the leadership of Nora. Nora recounted,

> The comment was just made a couple weeks ago. I've been here [identifying number deleted] years. She's been with me the whole time. So there's obviously a deep pain in her that something's changed that she felt was really, really important that was lost in the changeover to something new, and I'm sad that I

> can't convince her that that is still living Goal 1, even if it doesn't feel the same to her. (p. 30)

Nora is able to understand the perspective of the employee she described and others within the school community who question the Sacred Heart nature of the new direction of the school. She stated, "In a time of great change, it should be expected. I'm not surprised by it" (p. 31). The doubt and concerns do weigh heavily on her leadership team, most of whom Nora has hired. They are also experiencing the tension among the school community, as reported by Nora in her following study-interview comments:

> [The leadership team] feel[s] like, here we are working so hard to live the goals and criteria, and many of the veteran people point at us and say, "You don't get it. You don't get it," and I said, "But that's part of change, is knowing that people have to mourn what they had before they can accept what's new, and they're still mourning." (p. 31)

It could be of great value for the Network of the Sacred Heart Schools to open a dialogue with the Heads of school to address this phenomenon of employees questioning the Sacred Heart nature of decisions. A seasoned Head or panel of Heads could lead a helpful discussion to provide support to other leaders likely to encounter this challenge. Finally, given the frequency of Heads of school interchanging the term *mission* with goals and criteria, the Network may have an opportunity to conduct formation work to help all school leaders properly identify the distinction between the broader mission of the Society of the Sacred Heart and the more specific education philosophy of a Sacred Heart school, as articulated within *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005).

Recommendations for Future Research

Based upon the results of this study, several recommendations for future research and practice are extended. The literature search for this research found no studies that

focused on the decision-making practices of leaders in charism-rooted schools. Additionally, no study could be found that explored how observed and researched practices in decision making were reflected in charism-rooted schools (i.e., in an environment where reflection on mission and charism are integral to the school culture). Consequently, future study could explore the differences between how leaders within such schools operate compared to those in public or other nonreligious school settings. Future study could also open lines of inquiry into the following areas:

1. Through mixed methodology research, explore ways in which Catholic school leaders in other charism-rooted schools of any grade-levels explicitly use their school charism or mission in their decision-making processes.
2. Through survey data, identify opportunities to study the mission effectiveness of decision-making processes in charism-rooted schools.
3. Through mixed methodology research, explore ways in which general, school-related, decision-making research findings are or are not reflected in charism-rooted school cultures.
4. Through survey research, identify the potential for Catholic school leaders within a charism-based network to reflect collaboratively on how they use the mission of their schools in decision making and on identifying replicable best practice.
5. Through survey research, identify the differences between decision-making methods applied by school leaders in public or other nonreligious schools and those implemented within charism-rooted, Catholic schools.

Closing Remarks

Following the time invested in the four Heads of school who participated in this study, the researcher emerged with a clear sense of their commitment to the Sacred Heart education mission and to the articulation and embodiment of the *Goals and Criteria for Sacred Heart Schools in the United States* (Society of the Sacred Heart, U.S. Province, 2005). The participants are all devoted leaders who hold themselves to high standards of integrity. They each demonstrated a sense of knowing who they are, their individual strengths and weaknesses, in the broader context of Sacred Heart leadership. They recognize and appreciate the inherent truth and relevance of *Goals and Criteria for Sacred Heart Schools in the United States* and consistently apply its tenets. *Goals and Criteria for Sacred Heart Schools in the United States* is an integral component of the Sacred Heart school culture and imbedded in all the school-community performs. The participants in this study believe that the goals are too important to codify. They believe the goals are explicitly taught through formation and subsequently present in all decisions and implemented school direction. These four Heads of school strive to embody *Goals and Criteria for Sacred Heart Schools in the United States* by living them out with joy and conviction. These are strong leaders that exemplify the full extent of what it means to be a Sacred Heart head of school.

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APPENDICES

Appendix A

Network of Sacred Heart Schools in the United States-Canada Province

Network of Sacred Heart Schools in the United States-Canada Province as of July 25, 2014 (retrieved from sofie.org):

Sacred Heart Schools in the United States:

California	1. Sacred Heart Schools, Atherton
	2. Schools of the Sacred Heart, San Francisco
Connecticut	3. Convent of the Sacred Heart, Greenwich
Florida	4. Carrollton School of the Sacred Heart, Miami
Illinois	5. Josephinum Academy, Chicago
	6. Sacred Heart Schools (Sheridan Road), Chicago
	7. Woodlands Academy, Lake Forest
Louisiana	8. Schools of the Sacred Heart, Grand Coteau
	9. Academy of the Sacred Heart (The Rosary), New Orleans
Maryland	10. Stone Ridge School of the Sacred Heart, Bethesda
Massachusetts	11. Newton Country Day School of the Sacred Heart, Newton
Michigan	12. Academy of the Sacred Heart, Bloomfield Hills
Missouri	13. Academy of the Sacred Heart, St. Charles
	14. Villa Duchesne/Oak Hill, St. Louis
Nebraska	15. Duchesne Academy of the Sacred Heart, Omaha
New Jersey	16. Princeton Academy of the Sacred Heart, Princeton
	17. Stuart Country Day School of the Sacred Heart, Princeton
New York	18. Convent of the Sacred Heart, New York City
Pennsylvania	19. Country Day School of the Sacred Heart, Bryn Mawr
Texas	20. Duchesne Academy of the Sacred Heart, Houston
	21. The Regis School of the Sacred Heart, Houston
Washington	22. Forest Ridge School of the Sacred Heart, Bellevue

Sacred Heart Schools in Canada:

Nova Scotia	23. Sacred Heart School of Halifax
Québec	24. The Sacred Heart School of Montreal

Appendix B

Permission Letter

Network of Sacred Heart Schools

April 30, 2014

Dear Andi,

Thank you for your email dated April 12, 2014, requesting permission to interview four Heads of School for your upcoming dissertation study on how Heads of Sacred Heart schools use the *Goals and Criteria* when making mission-based decisions and what consistent processes they use when making mission-based decisions.

As you have explained, the purpose of your research will be to discover, through face-to-face interviews and follow-up phone interviews, the extent to which four Heads of Sacred Heart schools in the United States-Canada Network utilize the 2005 *Goals and Criteria* of Sacred Heart schools when making mission-based decisions within their respective schools. It will also identify the particular issues involved when such decisions were made.

Your study will also explore the manner in which the Heads of schools made their mission-based decisions concerning the *Goals and Criteria* of Sacred Heart schools. That is, did they or did they not utilize a consistent procedure, or a consistent checklist, or consistently involve others when making mission-based decision? If they did, the study will describe what that manner entailed.

I would like to grant you permission to work with the Network of Sacred Heart Schools. Please feel free to contact the Heads of School in the Network of Sacred Heart Schools-US and Canada with the invitation to participate in your study.

Best wishes as you proceed with your proposal, research and dissertation. I hope it will be possible to share the outcomes with the Network body. It appears to me that the information would be quite helpful to other Heads of Schools and their Leadership.

In your service,

Stephanie Moore

Stephanie Moore
Acting Interim Executive Director
Director of Technology and Global Integration
Network of Sacred Heart Schools-US and Canada

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Appendix C

Invitation to Participate

September 14, 2014

Dear Sacred Heart Head of School,

My name is Andi (von Sternberg) Shurley. I am an alumna of Duchesne Academy of the Sacred Heart in Houston, and I served for eleven years as an administrator at Schools of the Sacred Heart, San Francisco (Dean of Studies at Stuart Hall High School and then Head of School at Convent of the Sacred Heart High School). I am a doctoral student at the University of San Francisco in Catholic Educational Leadership. My dissertation seeks to study the use of the *Goals and Criteria for Sacred Heart Schools in the United States* when making decisions as well the extent to which a consistent process, checklist, or template, or the involvement others is utilized.

I will be conducting a qualitative study, which will involve interviewing four Heads of school from Network schools. Below is my statement of purpose:

> *The purpose of this study will be to discover, through face-to-face interviews and follow-up phone interviews, the extent to which four Heads of Sacred Heart schools in the United States Network utilize the 2005 Goals and Criteria of Sacred Heart schools when making decisions within their respective schools. It will also identify the particular issues involved when such decisions were made. The study will also explore the manner in which the Heads of schools made their decisions. That is, did they or did they not utilize a consistent procedure, or a consistent checklist, or consistently involve others when making decisions. If they did, the study will describe what that manner entailed.*

The Executive Director of the Network of Sacred Heart Schools has extended permission to me to reach out to you for help with this project, and I am writing to you today to ask if you would be willing to participate in an interview with me about this topic.

I hope to begin interviews in the fall of 2014. The initial interview will last for around an hour and will be in person at a time and place that is mutually agreeable, possibly during the October Membership Meeting in St. Charles. Following this interview, I will prepare a transcription of our conversation and provide it to you for your feedback and clarification. We would then schedule a follow-up phone interview to discuss your feedback. This interview would last no more than one hour and would be scheduled at a mutually agreeable date and time.

Your participation in this study is completely voluntary. Individual participants and schools will only be named or identified through the use of pseudonyms. I will strive to protect the confidentiality of the Heads through this process, and I will follow the best practices of qualitative research methodology with the help of my Dissertation Committee. I believe that the data I collect through this process will be of use to the Network and to all of the leaders in the schools.

If you have questions regarding these procedures please feel free to contact the Institutional Review Board for the Protection of Human Subject at the University of San Francisco at 415.422.6091 or at IRBPHS@usfca.edu.

While I will only be interviewing four Heads of School, I would be grateful for a deep pool of potential interviewees as this will help to bring richness to this study and to the data gathered. Your participation in this study will have an impact on Sacred Heart schools in the Network through providing understanding of how the leaders of our schools make decisions, and, most importantly, the role the *Goals and Criteria* play in these decisions.

If you have any questions please contact me at amvonsternberg@usfca.edu or by phone at 415-xxx-xxxx. I greatly appreciate your time, as I appreciate your service in leadership at our Sacred Heart schools.

I thank you for your participation in this project.

Sincerely,
Andi von Sternberg Shurley
Doctoral Candidate, University of San Francisco

Appendix D

Informed-Consent Form

UNIVERSITY OF SAN FRANCISCO
CONSENT TO BE A RESEARCH SUBJECT

Purpose and Background
Ms. Andrea von Sternberg Shurley, a doctoral student in the Catholic Educational Leadership program in the School of Education at the University of San Francisco, is conducting a study on how Heads of School in Network of Sacred Heart Schools in the U.S. make decisions. Specifically, she is seeking to explore the extent to which the Heads of School use the *Goals and Criteria* as well as any consistent processes when making decisions.

I am being asked to participate because I am currently a Head of School at a Sacred Heart Network school in the U.S.

Procedures
If I agree to be a participant in this study, the following will happen:

1. I will participate in one face-to-face interview with the researcher. The interview will last up to one hour. The researcher will digitally record the interview using a digital recording device. The interview will occur at a location and time that is mutually agreeable to me and to the researcher. I will receive the questions which will guide the interviews approximately one week prior to the interview. These questions will focus on my experience and practice of making decisions in a Sacred Heart school as a Head of School.

2. Following the interview, I will receive a written transcript of the interview. I will be asked to review the transcript, offering comments, corrections, and clarifications.

3. Next, the researcher and I will schedule a follow up phone interview to discuss my feedback and provide any further clarifications. This interview will also be recorded, and I will have an opportunity to review any new content added to the research data.

Risks and/or Discomforts

1. Depending on my comfort level of discussing how I make decisions and the extent to which I use the *Goals and Criteria* when making decisions, it is possible that some of the interview questions may be uncomfortable. I am free to decline to answer any questions I do not wish to answer or to stop participating at any time.

2. Because the *Goals and Criteria* are considered by the Network of Sacred Heart schools to be "sine qua non" for Sacred Heart education, expressing in an honest way the extent to which I use the *Goals and Criteria* when making decisions may make me uncomfortable. Therefore, the researcher will, to the greatest extent possible, seek to protect my identity and the identity of the school at which I am Head of School.

3. I understand that participation in research may mean a loss of confidentiality; however, study records will be kept as confidential as is possible. At the beginning of the interview, I will be asked to select a pseudonym to which I will be referred in all written records related to this study, as well as a pseudonym for the school at which I am employed. Neither my own individual identity nor the identity and specific location of my school will be used in any reports or publications resulting from this study. All digital recordings of interviews and digital copies of written transcripts will be kept in password-protected computer files to which only the researcher has access. Paper copies of the written transcripts will be stored in a locked cabinet in the researcher's home.

Benefits
The chief benefits to me from participating in this study will be the opportunity to reflect deeply and critically on my decision making practices and the knowledge that I have contributed to research that will also benefit all Sacred Heart Network schools and other schools rooted in a religious charism and mission.

Costs/Financial Considerations
Financial costs to me will be limited to the cost of transportation to and from the site at which the interviews will be conducted and the cost of accessing the internet in order to review the written transcripts of the interviews.

Payment/Reimbursement
I will not be financially or materially compensated for my participation in this study, nor will I be reimbursed for any expenses I may incur as a result of my participation.

Questions
I have talked to Andrea von Sternberg Shurley about this study and have had any questions answered. If I have further questions about the study, I may call her at (415) 813-8709 or email her at amvonsternberg@usfca.edu.

If I have any questions or comments about participation in this study, I should first talk with the researcher. If for some reason I do not wish to do this, I may contact the Institutional Review Board for the Protection of Human Subjects (IRBPHS), which is concerned with the protection of volunteers in research projects. I may reach the IRBPHS office by calling (415) 422-6091 and leaving a voicemail message, by e-mailing IRBPHS@usfca.edu, or by writing to the IRBPHS, Department of Psychology, University of San Francisco, 2130 Fulton Street, San Francisco, CA 94117-1080.

Consent
I have been given a copy of the "Research Subject's Bill of Rights" and I have been given a copy of this consent form to keep.

PARTICIPATION IN RESEARCH IS VOLUNTARY. I am free to decline to be in this study, or to withdraw from it at any point. My decision as to whether or not to participate in this study will have no influence on my present or future status as a student or employee at the University of San Francisco.

My signature below indicates that I agree to participate in this study.

_____

Subject's Signature Date of Signature

_____

Signature of Person Obtaining Consent Date of Signature

Appendix E

Demographic Questionnaire

Participants received the following questionnaire by email. Responses were collected through email, too.

DEMOGRAPHIC DATA

This information will be used for categorizing purposes when I begin to analyze the interview data. I will anonymize all data that goes into the final paper. If you have any questions, please let me know.

1. What is your educational background? Please include all of your academic degrees and the institutions at which you earned them.

2. For how many years have you worked at your current school?

3. For how many years have you been Head at this school?

4. Have you ever worked in another Sacred Heart school? If yes, which one(s) and for how long at each?

5. Have you ever worked in a school that is not a member of the Sacred Heart Network of Schools? If yes, which school(s) and for how long at each?

6. Have you had any professional experience outside of education? If yes, please describe the type of work.

7. Were you ever a student in a Sacred Heart school? If yes, for how many years and at what levels?

8. How would you describe the population and size of the school at which you serve? (number of students, single-sex or other, grade levels served)

9. In what ways have you developed your understanding of the Goals and Criteria?

10. Have you participated in the SHCOG process? If yes, in what way(s)?

11. Please provide me with the pseudonym you would like me to use to refer to you throughout this study.

12. Please also provide a pseudonym for your current school. If you are unsure about this, we can work on this together.

Appendix F

Interview Protocol

The researcher will collect and compile demographic data prior to the interview. The researcher will present this information to the subjects at the interview at which point she will confirm that all information is correct.

For the actual interview, the researcher will open as follows:

- Greet and thank the participant for his or her time.
- Collect the signed informed consent form from the participant.
- Explain to the participant how his or her confidentiality will be maintained along with the identity of the school at which he or she teaches.
- Discuss with the participant that the questions to guide this interview are intended to spur conversation. He or she is free to raise other questions or ideas that he or she wishes to discuss or believes to be important, so long as they fall within the general area of research for this study.

Next, the researcher will review the demographic data reported via email and confirm the subjects' chosen pseudonym and the pseudonym for the subject's school. The digital recording device will not be turned on until its use is agreed upon. Once this is accomplished, the researcher will turn on the digital recording device, and begin the interview.

To begin the recorded interview, the researcher and subjects will engage in dialogue in a semi-structured interview covering the following questions:

1. Tell me how you use the *Goals and Criteria* when making decisions at your school?
2. When have you used them? Would you please share examples?

3. Did you do the same thing, follow the same steps in each decision-making process?
4. Do you ever use a checklist or a protocol? Or, is it all in your head?
5. Do you make these decisions on your own or with others?
6. Do you do these for all of your decisions?
7. Is there anything further you would like to share or discuss about decision making at your school? Or about how the *Goals and Criteria* are used for decision making?

After concluding these questions, the researcher will remind the subjects of next steps in the research process, thank the subjects, and turn off the recording device. At this point, with the device no longer recording, the interviewer will allow for a debrief.

Appendix G

Validation Principles for Narrative and Action Research

1. Principle of historical continuity
Analysis of the history of action: how has the action evolved historically?
Employment: how logically and coherently does the narrative proceed?

2. Principle of reflexivity
Subjective adequacy: what is the nature of the researcher's relationship with his/her object of research?
Ontologic and epistemolgic presumptions: what are the researcher's presumptions of knowledge and reality?
Transparency: how does the researcher describe his/her material and methods?

3. Principle of dialectics
Dialogue: how has the researcher's insight developed in dialogue with others?
Polyphony: how does the repot present different voices and interpretations?
Authenticity: how authentic and genuine are the protagonists of the narrative?

4. Principle of workability and ethics
Pragmatic quality: how well does the research succeed in creating workable practices?
Criticalness: what kind of discussion does the research provoke?
Ethics: how are ethical problems dealt with?
Empowerment: does the research make people believe in their own capabilities and possibilities to act and thereby encourage new practices and actions?

5. Principle of evocativeness
Evocativeness: how well does the research narrative evoke mental images, memories or emotions related to the theme?

From "Action Research and Narrative Inquiry: Five Principles for Validation Revisited," by H. Heikkinen, R. Huttunen, L., Syrjälä, and J. Pesonen, 2012, *Educational Action Research, 20*(1), p. 8. Copyright 2011 by Taylor & Francis. Reprinted with permission.

Appendix H

Approval by the Institutional Review Board

DonsApps
STUDENT/ALUMNI

Andrea M Shurley <amvonsternberg@dons.usfca.edu>

Exemption Notification - IRB ID: 268

1 message

Christy Lusareta <noreply@axiommentor.com> Tue, Apr 1, 2014 at 10:05 AM
Reply-To: Christy Lusareta <calusareta@usfca.edu>
To: amvonsternberg@usfca.edu

UNIVERSITY OF SAN FRANCISCO

Protocol Exemption Notification

To: Andrea Shurley
From: Terence Patterson, IRB Chair
Subject: Protocol #268
Date: 04/01/2014

The Institutional Review Board for the Protection of Human Subjects (IRBPHS) at the University of San Francisco (USF) has reviewed your request for human subjects approval regarding your study.

Your project (IRB Protocol **#268**) with the title **SACRED HEART HEADS OF SCHOOL IN THE UNITED STATES: THE USE OF THE GOALS AND CRITERIA AND OTHER CONSISTENT PROCESSES IN MAKING MISSION-BASED DECISIONS** has been approved by the University of San Francisco IRBPHS as **Exempt** according to 45CFR46.101(b). Your application for exemption has been verified because your project involves minimal risk to subjects as reviewed by the IRB on 04/01/2014.

Please note that changes to your protocol may affect its exempt status. Please submit a modification application within ten working days, indicating any changes to your research. Please include the Protocol number assigned to your application in your correspondence.

On behalf of the IRBPHS committee, I wish you much success in your endeavors.

Sincerely,

Terence Patterson,

Chair, Institutional Review Board for the Protection of Human Subjects

IRBPHS - Univeristy of San Francisco

IRBPHS@usfca.edu

Appendix I

Society Mission Statement

The Society of the Sacred Heart is an international community of women in the Catholic Church, founded in 1800 by Saint Madeleine Sophie Barat. Sharing her vision and mission, we are convinced of the centrality of prayer and contemplation in our lives. We are committed to discovering and making God's love visible in the heart of the world through the service of education. Conscious that what we do, we do together, and remembering a tradition marked by a love for young people and missionary spirit, the Religious of the Sacred Heart carry out this service of education:

- Especially in the work of teaching and formation
- In other activities for human development and the promotion of justice
- In pastoral work and guidance in the faith. *(1982 Constitutions of the Society of the Sacred Heart, #13)*

St. Madeleine Sophie established ministry in four key areas:

1. Education in Sacred Heart Schools, universities and other educational settings
2. Educational works with the poor and marginalized
3. Spirituality, retreats, and spiritual ministry
4. Contact with people outside our communities.

(retrieved 2015, July 15 from https://rscj.org/content/mission-statement)