

**Revitalising the Prophetic and Collaborative Global
Leadership and the Charism of the Institute of the Marist
Brothers: Challenges and Opportunities**

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DEDICATION

I dedicate this research to my parents, João Amador do Prado (in memoriam) and Ilse Maria do Prado, and to my brothers and sisters, my sources of inspiration and leadership. To all my family members who seek the formation needed to develop their commitment to leadership and the capacity to build a fair, fraternal world of solidarity. To the Marist leaders, Brothers and laymen and women around the world for their efforts to evangelise and educate children and young people in different cultural, political, and economic contexts, and for their commitment to the Marist charism.

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ABSTRACT

Title: Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities

This PhD research represents an exploration of the constituent elements for the Institute of the Marist Brothers to be able to form prophetic and collaborative leaders who contribute to the vitality and continuity of the Marist charism.

It considers the essential elements of the formation of prophetic and collaborative global leaders who can contribute to the vitality and continuity of the charism of the Institute of the Marist Brothers. The study aims to examine the global leadership role that the General Council of the Institute of the Marist Brothers plays in ensuring the formation of prophetic and collaborative leaders. At the same time, the study identifies current strengths, challenges and opportunities in Marist leaders' formation processes that enable those leaders to contribute to the Institute's capacity to ensure the continuity and vitality of the Marist charism in the contemporary world.

The literature review key themes include the charism and leadership of Marcellin Champagnat in the foundation of the Institute of the Marist Brothers; the Marist Charism and concepts and formation of prophetic and collaborative global leadership.

The study employs mixed methods to understand the use of various data collection and analysis processes, both quantitative and qualitative, and to gather different points of view on the object of study. The research relied on a quantitative and qualitative online questionnaire, answered by 57 participants (Brothers and lay Marists) representing 26 Administrative Units across five continents and the Marist Secretariat of Laity of the Institute of the Marist Brothers. In addition, eight members of the General Council of the Marist Institute participated in semi-structured face-to-face interviews. Based on the analysis of the quantitative and qualitative responses from the online questionnaire and the face-to-face semi-structured interviews, it was possible to identify the essential elements for the formation of prophetic and collaborative global leaders for the vitality of the Marist charism.

The research findings identify the key role of the General Council as a promoter and facilitator of the formation of leaders at the global level, as well as the strengths, challenges and windows of opportunity faced by the Marist Institute in ensuring the future of the Marist charism. The study determines that although progress has been made, considerable effort is still needed on the part of the Institute for the formation of current and future Marist leaders. The study also confirms the need to reinforce further shared knowledge, vision and direction for the future of the Marist charism among leaders, and especially laypeople, as well as to ensure the spiritual care, accompaniment and strengthening of their formation processes. The study espouses the urgency for defining and implementing global institutional policies and guidelines for the formation of current leaders and for the attraction and preparation of new leaders. The study concludes by advocating for facilitating the formation of prophetic and collaborative global leaders through strengthening the communion and co-responsibility of Brothers and laity for the Marist charism, as well as the need to define their place and role in the Marist life and

mission. All this will require further articulation and considerable commitment from Brothers and lay Marists engaged in the Marist life and mission at all levels and institutional segments.

Keywords: Global Leadership. Prophetic Leadership. Collaborative Leadership. Marist Charism. Charism vitality. Charism transmission. Marist Leadership. Formation of Leaders.

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CHAPTER ONE

THE CONTEXT AND PURPOSE OF THE RESEARCH

1.1 INTRODUCTION

This PhD research represents an exploration of the essential elements for the Institute of the Marist Brothers to be able to form prophetic and collaborative leaders who contribute to the vitality and continuity of the Marist charism. The introductory chapter will outline the history of the Marist Brothers, the statement of the problem in relation to the transmission and sustaining of the charism, the purpose of the study, and understanding of key terms and the background of the researcher. This chapter will proceed to explore the impact of the founder of the Institute of the Marist Brothers and the current demography of the Institute. The chapter will conclude by outlining the structure of the thesis.

1.2 AN OPEN DOOR FOR THE FUTURE OF THE CHARISM OF THE INSTITUTE OF THE MARIST BROTHERS

The Institute of the Marist Brothers (Institute¹) is a religious congregation of the Roman Catholic Apostolic Church. It was founded by Father Marcellin Joseph Benedict Champagnat on January 2, 1817, in the small town of La Valla, in the Saint-Chamond region of France (Furet 1989, 61). Inspired by Mary, the mother of Jesus, Marcellin entrusted the Marist Brothers with the mission of providing an evangelising education designed to empower children and young people, in particular those who were economically disadvantaged, preparing them for life's challenges (The International Marist Education Commission 2007, 38).

Since its foundation over two hundred years ago, the Institute has contributed to the formal and non-formal education of thousands of children and young people (The International Marist Education Commission 2007, 53). Similarly, it has had a pioneering role in founding schools, universities, social works and publishing houses in the most diverse social contexts and in many countries. In some instances, hospitals were opened

¹ Throughout the chapters of this thesis the "Institute of the Marist Brothers" will be referred to primarily as "Institute".

to serve as a basis for Marist university students' practicum in the health field, as well as facilitating their service to the local community.

In recent years, the Institute has been deeply engaged in a reflection process regarding the continuity of the charism in an institutional sense, considering three key factors: the strengthening of the Marist mission globally, a serious vocational crisis for the Marist Brothers, and a significant increase in the laity's participation in the Institute's work. This era of transformation has been particularly significant since the Vatican II Council (11 October 1962-8 December 1965), which signalled the Church's initiation of a profound reform process, and which in turn impacted upon the various religious congregations. In reflecting on the reform process initiated by Pope John XXIII, Pope Paul VI, his successor stated:

this sacred Council has several aims in view: it desires to impart an ever increasing vigour to the Christian life of the faithful; to adapt more suitably to the needs of our own times those institutions which are subject to change; to foster whatever can promote union among all who believe in Christ; to strengthen whatever can help to call the whole of mankind into the household of the Church. (Pope Paul VI 1963, n. 1)

One of the most important results of the Vatican II reform process has been the greater prominence given to the laity in the ecclesial sphere. When referring to the laity, the document of the Vatican II Council entitled "Apostolicam Actuositatem" (Pope Paul VI 1965b, n. 1), Latin for "Apostolic Activity", states that "modern conditions demand that their apostolate be broadened and intensified". Furthermore, the same document states that:

an indication of this manifold and pressing need is the unmistakable work being done today by the Holy Spirit in making the laity ever more conscious of their own responsibility and encouraging them to serve Christ and the Church in all circumstances. (Pope Paul VI 1965b, n. 1)

The Church's increased openness to the laity has resulted in an important transformation within religious congregations, broadening the opportunities for the laity to contribute not only to the mission of the congregations, but also to participate in and live their charism fully as laypeople. In the Marist Institute, this movement gained momentum with the General Chapter of 1985, which, in addition to recognising the strength and value of the laity to the Institute, greatly encouraged the creation of the Champagnat Movement of the Marist Family (Secretariat of the Laity 2017, 26) by opening up concrete possibilities for laypeople to actively participate in the Marist charism. Since then, reflection on the Marist laity has been guiding in various Marist

forums at the international and local levels. In 2017, the 22nd General Chapter welcomed the document “Being a Lay Marist,” which addresses the Marist lay vocation, providing guidance principles as a reference for the Marist laity.

1.3 THE CURRENT CONTEXT OF THE INSTITUTE OF THE MARIST BROTHERS

In many parts of the world today, the Institute is simultaneously demonstrating continuous growth of the Marist mission and a constant decrease in the number of vocations to the Marist Brothers. The growth of the Marist mission occurs, above all, because of the significant presence and activity of lay Marists.

This vocational crisis for the Marist Brother is visible in several regions. In European countries and other countries such as the United States, Canada, Australia, South Africa and New Zealand, there has been a significant decrease in the number of vocations over the past two decades. Similarly, in Latin American countries such as Mexico, Brazil and Argentina, while until recently numbers remained high, vocations are now on a downward trend.

At present, the majority of vocations, albeit in smaller numbers, come from African and Asian countries (Institute of the Marist Brothers 2021). These developments have significantly impacted the mission, leadership, governance, profile and future prospects for the Institute, as well as the continuity and vitality of the Marist charism.

Concern about the number of vocations and the formation of the Marist Brothers is not a recent problem. As early as the 18th General Chapter, held in Rome in 1985, this issue was already a cause for concern for the Institute, and the following aspects in particular: pastoral work on vocations, the formation of the Marist Brothers and the restructuring of works on account of the vocational crisis. As Brother Seán Sammon, Superior General, stated:

vocation promotion and restructuring of apostolic works in light of declining numbers and increasing age secured first and second place respectively. Other topics included strengthening our formation programs and the hope that we would eventually give approval to a Guide in that area, developing our apostolic spirituality, promoting enculturation, revitalizing our identity as brothers and carrying back home the message of our new Constitutions and Statutes. (2008, 12)

On the occasion of its bicentenary on January 2, 2017, the Institute undertook to engage in a profound reflection regarding current and future prospects for transforming

existing processes and structures, specifically with a view to defining a new horizon for the Marist charism. One of the objectives was to identify any obstacles preventing the Institute from carrying out its mission and from embarking on new institutional initiatives to respond to the realities of today's world, while maintaining the essence of the charism (Institute of the Marist Brothers 2017). This reflection enabled the Marist leadership, and especially the members of the General Council as global leaders, to acknowledge their key role in accompanying and governing the Marist life and mission and in articulating future directions for the Institute.

There is a strong institutional belief that maximising vitality for the various expressions of the Marist life and mission at all levels of the Institute is directly proportionate to the efforts of Marist leaders in promoting the Marist charism. As such, it could be considered the responsibility of General Council to guarantee the necessary means for the vitality and continuity of the Marist charism. For this, General Council members have the support of Marist leaders at regional and local levels in order to ensure the Institute's educational and evangelising missions for children and young people in the most varied contexts of the Marist presence.

In his letter of convocation for the 22nd General Chapter, which coincided with celebrations for the second preparatory year of the Institute's bicentenary, Brother Emili Turú (2016), the Superior General for the 2009-2017 period, invited all Marists to rethink the future of the Marist charism through a transformative institutional dialogue:

I am sure that many of us have had an experience of conversations that transform us. It is interesting to note that, normally, they are not conversations about how to change others; rather, the very process of engaging in conversation produces changes in each one of us. . . . Yes, frequently the very process is transforming; the process, then, in some way becomes the goal. (Turú 2016, 4)

It could be said that Brothers and Lay Marists view General Council leadership as their source of inspiration and guidance when responding to the Institute's present challenges, and most especially to the calls of the 22nd General Chapter of 2017, held in Rionegro, Colombia. That Chapter proposed that all levels of the Institute develop a style of "government and leadership that favours prophetic servant leadership and closely accompanies Marist life and mission" (Institute of the Marist Brothers 2017).

It is worth noting here that in order to achieve continuity and fidelity to the Marist charism and mission, equal consideration must be given to both the opportunities and critical elements confronting contemporary Marist leaders, including: the multicultural

and global nature of the Institute, institutional economic asymmetries, the diminishing number and aging of the Marist Brothers, the role of the laity in the Institute, the mission to children and young people, and the Institute's international identity. It is indeed crucial for the Institute to recover and strengthen the Marist charism as "grace and talent and the capacity to inspire devotion and enthusiasm" (Lydon 2009, 42), and this for the benefit of the vitality and continuity of the Marist life and mission.

1.4 STATEMENT OF THE PROBLEM

In the context of the research topic, the dramatic diminution in the number of teaching religious represents a significant challenge. Lydon (2011, 139) points out that the Congregation for Catholic Education's (CCE 1982) document published seventeen years after the closure of the Second Vatican Council, was the first ecclesial text to signpost this decline:

this process [increase in the number of lay teachers in schools] has coincided with a notable decrease in the number of priests and Religious, both men and women, dedicated to teaching. . . . the Church can do no less than regret the decline in Religious personnel which has had such a profound effect on Catholic schools, especially in some countries. (CCE 1982, 3)

This decline was placed into clear relief by James Sweeney (1999, 269):

the immediate effect of Vatican II on religious life was not simply the setting in train of renewal, but an unanticipated shaking of the foundations. The late 1960's and early 1970's was a liminal period, a time of deconstruction of a pattern of life within orders which, since the nineteenth-century restoration project. . . had become more and more rigidly institutionalised. While organisationally superb, the restoration had disastrously underplayed the charismatic and personal-spiritual characteristics of the religious lifestyle. Orders took on features of. . . 'total institutions', bulwarks of the 'Fortress Church'.

While words such as 'deconstruction' and 'disastrously' might well be regarded as hyperbole, the consequences of Vatican II did, however, have far-reaching consequences for all Religious Congregations, particularly those involved in "active" apostolates such as the Church's education mission.

A detailed discussion around the multi-faceted reasons for this precipitous decline, which include a renewed understanding on the part of some religious of the implications of the post-Vatican II ecclesiological paradigm shift, underpinned by the notion of a common matrix of Gospel discipleship, is beyond the scope of this thesis. It is germane,

however, to cite the view of the Congregation (1982, 3) on a key reason apart from the obvious decline in the number of vocations: “the decrease is due to a lack of vocations, to the urgent call of other apostolic needs, and—at times—to the erroneous opinion that a school is no longer an appropriate place for the Church’s pastoral activity”.

In the context of school ministry, Peter Berger’s (1990) concept of ‘plausibility structures’ is germane. In essence Berger’s claim is that what we find believable is closely connected to the number of people who believe in it. It is easier, therefore, to be influenced by a religious charism if one is surrounded by those who are visibly religious. Collaboration between Brothers and lay leaders and teachers committed to the Marist mission and vision takes on a renewed significance.

The world is also currently undergoing several simultaneous crises. The economic crisis afflicting many countries around the world is sending millions of people into poverty. The ecological crisis is driving the planet to exhaustion through the unbridled exploitation of its resources. And finally, the health crisis—aggravated by the COVID-19 pandemic, since it emerged at the end of 2019—has exacerbated the gap between rich and poor and called into question humanity’s model for survival. For Boaventura de Sousa Santos (2020, 6), the current health crisis caused by the coronavirus “only aggravates a crisis situation to which the world population has already been subjected”.

The Institute of the Marist Brothers is experiencing the impact of the current world situation through all its entities around the globe, much like other religious congregations. There is great concern for the continuity and vitality of the Marist charism. The ability to read and interpret the new global reality and the capacity of the Church to provide coherent, up-to-date responses in line with its founding principles are crucial for the Institute’s survival. Indeed, reinvention is paramount in light of this promising turning point, not only for the Marist charism, but for the entire world. For this reason:

as an Institute we must be aware of the movements taking place in our time and age and, more importantly, must examine the values contained in each. A failure to do so might condemn us to hold on to the past at the very moment a new beginning is getting underway. (Sammon 2008, 20)

In preparation for the Institute’s bicentenary in 2017, Brother Emili Turú (2014), in a video message entitled “2017: a new beginning”, extended an invitation for the entire Institute to embark on a “new beginning” of the Marist charism. According to Turú, this “new beginning” for the Institute requires the commitment and cooperation of all. To this end, it will be fundamental to operate in:

three dimensions that will most probably impact Marist life in the near future. . . First, the need to direct our mission in a clearer and more decisive way towards the children and young people who are on the margins. Second, a response from the Institute to the clear emergence of the Marist laity. And finally, a more careful attention to the mystical dimension of our lives. (Turú 2014)

Brother Ernesto Sánchez Barba, Superior General of the Institute (2017-2025), in a message addressed to the whole Institute, stated that:

. . . besides the example of so many brothers and laypeople who passionately live the gift of the charism, we need to create opportunities for showing the charism in action and talking about its continuing relevance. It is our turn to take up the task of sharing the gift that the Spirit made available through Saint Marcellin Champagnat and which, over the years, has been evolving and adapting in each period of history. (Barba 2020, 81)

In this context, particularly to the Marist Brothers Institute, the aging of the Marist Brothers and the decline in the number of vocations to the religious life is evident. This phenomenon, along with the continual growth of the presence of laypeople in the Marist mission, is having a profound impact on the future of the Marist charism as well as on the education and evangelisation of children and young people by the Marist Brothers' Institute. In short, this convergence of a decline in Marist Brothers and an increase in lay involvement is demanding a paradigm shift. According to the data from the General Secretary of the Marist Brothers (2019), up to the mid-1960s, most teachers and administrators in Marist schools were Marist Brothers. With the reduction and aging of the Brothers, the last decades have seen laypeople taking over a significant role in the mission, so much so that today more than 95% of teachers and administrators working in Marist schools and other educational projects are laypeople (General Secretary of the Institute of the Marist Brothers, 2019). Consequently, the Institute is moving from one paradigm, in which the Marist charism and mission were seen as something exclusive to Marist Brothers, towards another paradigm of communion and co-responsibility of Brothers and laypeople for the Marist charism and mission.

Faced with this new reality, in comparison to other religious congregations, the great challenge which touches the Institute of Marist Brothers in a profound and particular way, is the formation of leaders, especially of lay leaders, in order to transmit the charism. The picture of Marist schools and other educational institutions at the present time is quite different from when they were staffed almost exclusively by Marist Brothers, who arrived at the ministry after years of formation in the Marist religious life. Lay Marists, who today form an integral part of Marist life and mission, come from different experiences of

mission and formation. The vast majority have had an initial contact with the Marist charism when they began to work in some Marist project. For this reason, it is imperative for the Institute of Marist Brothers to offer a solid and ongoing formation for these laypeople, assuring them a greater acknowledgement of their efforts and a greater involvement in the future of the Marist charism and mission. This formation would guarantee their presence at the heart of the Church and the world, offering their contributions to help thousands of people live their Christian vocation and guiding their lives as citizens inspired by the principles and values of the Marist charism.

The Institute of the Marist Brothers is presented with the challenge of engaging the present in order to ensure that its charism can continue to be present and vital in the service of thousands of people around the world. For this purpose, the Institute will need prophetic and collaborative global leaders, who are both knowledgeable and committed to the Marist charism, and capable of mobilising the Marist institution in its objective of promoting greater vitality for the Marist life and mission. In this sense, the issue that this case study proposes to investigate through a mixed methods approach is the formation of Marist leaders, namely: what are the essential elements for the formation of prophetic and collaborative global Marist leaders needed to ensure the vitality and continuity of the Institute of the Marist Brothers' charism?

1.5 PURPOSE OF THE STUDY

In order to respond to the issue presented for research, this case study aims to explore the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the charism of the Marist Brothers' Institute. This is consequently the general aim on which this research focuses its efforts.

In order to ensure a detailed study with depth and breadth into the identified phenomenon, the general objective has been split into two more specific objectives. The first objective is to examine the role of the Institute of the Marist Brothers' General Council as a global leader in ensuring the formation of prophetic and collaborative leaders. The second objective is to identify the current strengths, challenges and opportunities for processes of Marist leadership formation so as they can contribute to the Institute's manner of ensuring the continuity and vitality of the Marist charism.

1.6 UNDERSTANDING OF KEY TERMS USED IN THE CASE STUDY

As this is a case study of a very specific phenomenon, appropriate terminology has been used which is fundamental to the understanding of the research. Although terms used are global, they acquire their own meanings in the context of this research, since they translate the history, culture and experience of the Institute of the Marist Brothers. The key terms used are leadership formation, Marist leadership, global leadership, prophetic leadership, collaborative leadership and the Marist charism, all from the perspective of Marist leadership formation. The goal is to ensure understanding of the basic elements of each concept within the Marist context, in view of an improved understanding of the present study, while keeping in mind that a broader and deeper description can be found throughout the chapters of this thesis.

1.6.1 Leadership Formation

The term “leadership formation” is understood as referring to all processes, programmes and initiatives geared towards the holistic development of Marist leaders, as inspired by Marist principles and values. According to Green (2018, 179), a holistic formation, which goes beyond the human and professional dimensions to also embrace the spiritual dimension, must be sensitive, engaging, respectful, integrated and inspiring.

For Hibbert *et al.* (2017, 604) the formation of leaders should not only consider leaders on an individual basis, but also in the collective context of leadership. It should balance theory and practice, valuing the experiences of leaders, their background and how it translates into pedagogy. The formation processes must also contemplate the personalised accompaniment of each leader as an individual: “little is achieved through language, concepts, story, ritual, accompaniment, symbol, art, music or other resources and programs if they are framed in a hermeneutic that is disconnected from how people make their meaning” (Green 2018, 174).

1.6.2 Marist Leadership

Although it is a religious institution, the leaders considered in this study include both Marist Brothers and lay Marists. Lay Marists today represent more than 95% of the Institute’s Marist leadership of the Marist mission (Institute of the Marist Brothers 2021).

There is a growing spirit of communion and co-responsibility of Brothers and laity around the Marist charism. Therefore, it is of paramount importance to consider Marist leadership as a whole and to understand the place and role of both, Brothers and Lay Marists, in the context of Marist life and mission, and in relation to the continuity and vitality of the charism. The 22nd Chapter (2017) defined the term “Marists of Champagnat” as all Brothers and lay Marists who feel inspired and committed to live the Marist charism according to the inspiration of Marcellin Champagnat and the first Marist Brothers.

1.6.2.1 Marist Brothers

According to the Constitutions and Statutes of the Institute of the Marist Brothers (2011, 18), the Marist Brothers are religious who follow Jesus Christ in the manner of the Virgin Mary. They live in community, profess the vows of chastity, poverty and obedience, and are guided in the mission of educating and evangelising children and young people, in accordance with the intuition of Marcellin Champagnat. At present, in the new context of the Institute, the Marist Brothers share Marcellin’s charism in co-responsibility with the laity, seeking to be both among them and an inspiring presence for the charism in their mission.

1.6.2.2 Lay Marists

Pope Paul VI’s Dogmatic Constitution of the Church, *Lumen Gentium*, defines the laity as “all the faithful except those in holy orders and those in the state of religious life. . . by baptism made one body with Christ. . . they carry out for their own part the mission of the whole Christian people in the Church and in the world” (1964, n. 31). Pope John Paul II (1988, n. 15), in his Post-Synodal Apostolic Exhortation, *Christifideles Laici*, states that “because of the one dignity flowing from Baptism, each member of the lay faithful, together with ordained ministers and men and women religious, shares a responsibility for the Church's mission”.

At the core of the Institute and based on the doctrine of the Church regarding the lay vocation, the term “lay Marist” is understood as “Christian men and women, who in the course of our lives have listened to the call of God to live the charism of Champagnat, and, from our lay state, we respond to it” (International Editorial Commission 2009, 27).

1.6.3 Global Leadership

The 22nd General Chapter (2017) recognises the Institute of the Marist Brothers as a global charismatic family. Therefore, the term “global leadership” acquires two important meanings. The first concerns the style and the profile of Marist leadership. The General Chapter itself defines global leadership as the ability to create a global charismatic family that is open to all, promoting and nurturing Marist life in all its diversity. A Marist leader is someone who recognises and acts as part of a global, open body, with a heart that transcends borders, and is focused on the passion that inspires the capacity of being and acting as a Marist.

The second meaning refers directly to the leaders who are the focus of this case study. These are the members of the General Council who, together with the Superior General, Vicar General and General Bursar, are part of the General Government of the Institute of the Marist Brothers. For the 22nd General Chapter (2017), a global Marist leader “promotes and strengthens the Institute as a global family and lets go of structures and attitudes that are not supportive of this”.

In the same direction and in a complementary manner, Osland *et al.* (2006, 204), define global leadership as “a process of influencing the thinking, attitudes and behaviours of a global community to work together collaboratively toward a common vision and common goals”. However, according to Beechler and Javidan (2007, 136), “most writing in the global leadership literature seems less interested in a clear definition and more interested in the issue of competencies”.

1.6.4 Prophetic Leadership

Prophetic leadership is characterised by its commitment to the defence of life and is guided by the values of the Gospel (Pope Francis 2015; Byler 2014). In the biblical sense, being prophetic is not a profession but a vocation. Therefore, a prophet is one chosen and sent by God to preach (Am 7:14–5). In the book of Deuteronomy (5:27), a prophet is one recognised by the community or group who speaks on behalf of God. Reimer (2008, 813) states that “prophets spoke before the community as messengers of God”. Accordingly, McFarland *et al.* (2011, 413) state that prophecy is in the name of God.

For De Oliveira (2020), a prophetic witness requires a constant and passionate search for the will of God a generous and indispensable sense of ecclesial communion. Based on this concept of prophet, Campbell points out that “all prophetic leadership should begin and end with the person of Jesus Christ” (Campbell 2015, under Prophetic Leadership). Consequently, a prophetic leader can be defined as one who inspired by the Word of God, interprets the signs of the times, denounces social injustices, builds with others a vision of the future based on Gospel values, and mobilises followers to carry this vision out.

Some characteristics are important in prophetic leaders. First, it is their charisma that helps them to build a vision and gives them the ability to articulate and influence people to be committed to this vision and build community (Avolio and Yammarino 2013, Green 2018; McHugh 1968; Parry *et al.* 2019; Shamir *et al.* 1993, 583). Second, it is their way of assuming their leadership as a gift from God, a vocation, a call to action (Byler, 2014; Geise 2002; Nouwen, 2018). Third, it is their readiness for service (Blanchard and Broadwell, 2018; Greenleaf 2002; Prosser 2001), and finally, the fourth characteristic is their sense of belonging to a community (Parry *et al.* 2019).

1.6.5 Collaborative Leadership

Another important component associated with global and prophetic leadership is collaboration. To understand collaborative leadership, it is fundamental to examine the issue critically and to consider both societal as well as theological elements. Taken together, idea of collaborative leadership complements the understanding of prophetic and collaborative global leadership necessary for the transmission of the Marist charism. These elements are fundamental to ensure a process of formation of Marist leaders, both Brothers and laypeople, who are committed to the future of the Marist charism.

Within the society, Chrislip and Larson (1994) and ‘t Hart (2014) state that collaborative leadership aims to transcend organisational and procedural barriers by fostering constructive processes that enable stakeholders to meet, facilitate, and cultivate their interaction. Collaborative leadership implies the involvement of several leaders, either formally or informally, rather than one single leader (Müller and Van Esch 2020). The essence of collaborative leadership is to create a shared vision and a joint strategy for all actors involved (Chrislip and Larson 1994; Fletcher and Käufer 2003). Collaborative leadership is not something that is born spontaneously (Chrislip and Larson

1994; 't Hart 2014). For it to be successful, it is of the utmost importance that leaders share their fundamental beliefs and values as individuals and in relation to their common quest, for it is they who generate collaboration (Walter and Petr 2000, 495–6; Van Esch 2009).

Within the perspective of the Christian and Marist tradition, there are four fundamental dimensions for the understanding of collaborative leadership. These dimensions are teased out in Chapter four of this work. The first dimension refers to collaboration as a participation in God's Mission (Mt. 28:19–20, Van Aarde 2016, Turú 2015 and Cortez 2019). Following on this, the second dimension sees collaboration as co-responsibility of all the baptised in the mission of the Church as the way to accomplish the mission from God (Mk 16:15, Jn 20:21, Pope Paul VI 1965b, Pope Benedict XVI 2010, Pope Francis 2013, Pope John Paul II 1988, Serafim 2016, Turú 2015 and Wright 2012). The third dimension is presented as a collaboration in mission which can be fulfilled following Mary's example. Therefore, Mary is an inspirational and prophetic reference point for the fulfilment of the mission of the Church (Lk 1:26–45, Jn 2:1–12; 19:25–7, Acts 2:1–47, Pope John Paul II, 1988-2001, Pope Benedict XVI, 2005, Pope Francis, 2013, Leahy 1996, Turú 2015, Labaddie 2020). Finally, the fourth dimension looks at collaborative leadership within the present context of the Marist Institute, as communion and co-responsibility of Brothers and laypeople in Marist life and mission (Pope John Paul II 1988b, Institute of the Marist Brothers 2020a).

Prophetic and collaborative leadership is the style of global leadership which the Institute of Marist Brothers seeks to develop for the future of the Marist charism. This style of leadership responds to the present challenges of the world and Church. Motivated by the person of Jesus Christ and His Gospel, Marist leaders find in Mary and in Marcellin Champagnat points of reference for the fulfilment of their mission to educate and evangelise children and young people in the most varied circumstances in which they find themselves, with a global awareness and in a prophetic and collaborative fashion.

1.6.6 Marist Charism

The Marist charism in the context of this study is understood as a precious treasure, a gift from the Holy Spirit via Marcellin Champagnat shared in a universal way. According to Lydon (2011, 75) and Michael Green (2018, 24), the word “charism” stems from the Greek χάρισμα (tr. charism), literally translated as “gift”, “a generous gift”, or

“gracious gift”. For Lydon (2011, 43) charism is “a gift which enables the believer to contribute to the common good”. In his letter to the Corinthians, Saint Paul emphasizes that the variety of gifts must work together for the benefit of the community (1 Cor 12:4–7). Seán Sammon (2006, 25) also sees charism as a “free gift” of the Spirit given for the good of the Church and the use of all. Similarly, Lydon (2009, 43) states that “a charism could be described as the concretisation of this universal gift”. For McFarland *et al.* (2011, 94), charism can be used in a way to combine collective and individual meanings that include the service to the Church and characteristics of a particular religious order, as derived from the vocation and practice of its founder”.

The Marist document *Water from the Rock* (Institute of the Marist Brothers 2007, 25–6) underlines the gift of the Marist charism as an invitation for Brothers and Lay Marists to develop, fully live and deepen it in the way of Mary. Similarly, the *Constitutions and Statutes of the Marist Brothers* recognise the Marist charism as a gift from the Holy Spirit via Marcellin Champagnat and through which Christians are inspired to follow Jesus Christ as Mary did (Institute of the Marist Brothers 2020a, 16).

The Marist charism is distinguished by its own central dimensions and characteristics. According to the document *Gathered Around the Same Table*, there are three inseparable dimensions of the Marist charism: spirituality, mission and shared life (International Editorial Commission 2009, 34). The specific characteristics of the Marist charism are *presence, simplicity, family spirit, love of work, and following Jesus in the way of Mary*. It is the sum of these elements and their interactions with each other that give the Marist style its originality inspired by the Spirit (The International Marist Education Commission 2007, 45).

Therefore, maintaining the Marist charism is essentially to uphold the aspirations of a different way of life for thousands of children and young people around the world who are served by Marist leaders, and who, in the Marist charism find the realisation of their life’s mission. According to St. Paul “there are different kinds of gifts, but the same Spirit distributes them. There are different kinds of service, but the same Lord. There are different kinds of working, but in all of them and in everyone it is the same God at work” (1 Cor 12:4–10).

1.7 BACKGROUND OF THE RESEARCHER

I am both a Marist Brother and currently a member of the General Council of the Institute of the Marist Brothers (as part of the 2017 to 2025 administration). Throughout my Marist life, I have worked at the Province level (in one of the Marist Provinces in Brazil), the Regional level (in South America), and at the Institute level (in the General Administration in Rome, Italy) in accompanying Marist life and mission. These experiences have provided me with first-hand experience and direct contact with various Marist realities around the world.

My academic background consists of a Bachelor's Degree in Religious Sciences (1994, from the Pontifical Catholic University of Paraná – PUCPR, Brazil); a Language Arts Degree with a qualification in Portuguese and English (2000, from the University of the Oeste de Santa Catarina – UNOESC, Brazil); an Expertise Degree in Human Development Psychology with a concentration in Child & Adolescent Psychology (2002, also from the University of the Oeste de Santa Catarina – UNOESC), and a Master's Degree in Education, with a concentration on “Brazilian Educational Thought & Teacher Education” (2009, from the Pontifical Catholic University of Paraná – PUCPR). The title of this research dissertation was “*The Drowned Pedagogy of Love in Teaching Practice, Inspired by Paulo Freire*”.

Throughout my career, I have taken part in various educational congresses and seminars held in Brazil and other parts of the world. I have engaged in the writing of some Marist institutional documents in the areas of evangelisation and solidarity: *Diretrizes Nacionais da Pastoral Juvenil Marista, Mística da Pastoral Juvenil Marista / Marist Family: Presence and Mission in the World*; co-authored an article with Dr. Rogério Renato Matteucci under the title ‘Marist Education in Brazil: Achievements and Challenges’, published in the Centre for Research and Development in Catholic Education's (CRDCE) International Studies in Catholic Education journal; and participated in the seminar team for the development of the document on *Education Today and Tomorrow* of the Vatican's Congregation for Education (CCE).

My professional experience is aligned with the mission of the Marist Brothers Institute. I was a teacher and Co-ordinator of the Department of Religious Education at Frei Rogério Marist School, Joaçaba, Santa Catarina, in Brazil (1995 to 1996), Director of the Center for Vocational Training and Youth Leadership in parishes and public schools, in Joaçaba, Santa Catarina, in Brazil (1997 to 2002), Director of the Pastoral

Department of the Marist Province of Brazil Centre-South, Curitiba, Paraná, Brazil (2003 to 2008), Executive Secretary of the Brazilian Marist Union (UMBRASIL) and also Coordinator of the Mission Department of this entity, covering the areas of Education, Solidarity and Evangelisation, Brasília, Federal District (2006-2010).

From 2011 to 2016, I served as the Director of the Marist Brothers' International Mission Secretariat in Rome, Italy, visiting and working with the various teams in the most varied contexts of Marist mission in the five continents. In the context of this international experience and as the Director of this Secretariat, I contributed to the creation and consolidation of some Marist mission networks worldwide, including the Network of Marist Institutions of Higher Education and the Network of Marist Publishing Houses. In addition, I collaborated in the implementation of the Marist Youth Ministry programmes (MYM) in several countries and participated in the coordination of the New Models Project, with purpose of reorganising the managerial and governance structures of the Marist Institute to better accomplish the mission. I participated in the implementation of the Continental Teams of Marist Mission of the Americas, Africa, Europe, Oceania and Asia, whose purpose was the development and implementation of Formation Programmes for School Leaders, Social Workers and Marist Universities. I was also actively involved in the elaboration and implementation of a range of educational projects and evangelization programmes.

During this international experience, I was directly involved in the organisation of the International Marist Youth Gatherings in Madrid (2011), Rio de Janeiro (2013) and Lyon (2016), and coordinated the II International Marist Mission Assembly in Nairobi, Kenya (2014) which had participants from 40 countries. In the field of education, I participated in the articulation of actions with other religious institutions through the Education Commission of the International Union of General Superiors (UISG-USG) and the Catholic International Education Office (OIEC) (2011-2016), in Rome, Italy.

It was in this context I became aware of the challenges faced by Marist leaders in carrying out their mission. By visiting various Marist leaders and discussing their realities, getting to know their work and communicating with them about their mission, their formation and the future of the Marist charism, I was able to fully appreciate the urgency for the Institute to strengthen the formation process and accompaniment of its leaders. As one of the global Marist leaders and as someone committed to the charism, I believe this study can provide the opportunity to contribute to the formation of the

Institute's leaders, with a view to furthering the continuity and vitality of the Marist charism.

1.8 MARCELLIN CHAMPAGNAT, FOUNDER OF THE INSTITUTE OF THE MARIST BROTHERS

According to his first biographer, Brother John Baptist Furet (1979, 47), Joseph Benedict Marcellin Champagnat was born on 20 May 1789 in the municipality of Marlhès, in the region of Saint-Genest-Malifaux, in the Loire region of France. He was baptised the following day, on the Feast of the Ascension of the Lord, by parish priest Alliot.

Marcellin Champagnat grew up in a context of significant change in political and ideological thought that affected the whole world: namely, the social phenomenon of the French Revolution which commenced in May 1789. As was the case in Europe and other parts of the world, feudalism reigned for many centuries, producing great economic, social and cultural inequalities. The French monarchy became a powerful force that led the country into successive wars in order to dominate Europe. The court and other dominant sectors possessed every luxury in contrast to the misery of the poorest sectors of the population (Zind 1988, 32).

The French Revolution began in an intense way and with radical measures. In May 1789, the so-called "Estates General" came together and the bourgeoisie, who were at the apex of the social stratum, and referred to as the Third Estate, questioned the tallying process for votes, proposing that they should be counted by number of representatives rather than by state (Zind 1988, 15). The nobility and the clergy, who were respectively the Second and First Estates, did not accept the proposal. Thus, the bourgeoisie withdrew from the Estates General and formed the National Assembly, with the aim of creating a constitution for the country. The seizure of the Bastille on 14 July 1789, and the ensuing Declaration of the Rights of Man and of the Citizen formed the third event of this initial phase of the revolution (Reis 2019, 66). The first phase involved the revolt of the nobility, when they refused to help the king by paying taxes. The second was the formation of the National Assembly and, on 20 June 1789, the members of the French Third Estate took the Tennis Court Oath, a pivotal event in the French Revolution (Lanfrey 2015, 50). There, they vowed "not to separate and to reassemble wherever circumstances require, until the Constitution of the kingdom is established" (Robinson

1895, 462). These events, of great impact in France and in the world, would outline the life of Marcellin Champagnat.

1.9 THE FOUNDATION OF THE INSTITUTE OF THE MARIST BROTHERS

The special event which gave rise to the founding of the Institute of the Marist Brothers was Marcellin Champagnat's promise to create a Society dedicated to Mary, together with Fathers Courveille, Colin and nine other companions. They made this promise on 23 July 1816 at the Shrine of Our Lady of Fourvière in Lyon, the day after their ordination (Muñoz *et al.* 2013, 14). This society was a project of Father Courveille, who felt inspired by God to establish a society dedicated to Our Lady, in the same vein as the Society of Jesus (the Jesuits). The project featured the foundation of the branches of Priests and Marist Sisters (Lanfrey 2015, 41). Marcellin Champagnat strongly insisted that such a society should have a branch of Brothers dedicated to the evangelisation and Christian education of children and young people. Given his insistence, Marcellin Champagnat was tasked with conceptualising this segment of the Society (Zind 1988, 150).

On 12 August 1816, Marcellin Champagnat was assigned the Parish of La Valla, a small and poor rural town near Saint Chammond (Ronzon 2010, 59). He brilliantly exercised an apostolate in this parish and won the trust of the people. However, he was always troubled by the poor quality of education and the little knowledge that the local people, especially the children and youth, had of God (Furet 1989, 37).

It was in this context that he met Jean Marie Granjon and Jean-Baptiste Audras (Lanfrey 2015, 69). Together, on 2 January 1817, the three of them began the Congregation of the Institute of the Little Brothers of Mary, which would later be referred to by the Church as the Institute of the Marist Brothers of the Schools. Marcellin Champagnat was certain that he had the good will and protection of the Virgin Mary, which is why he named the Institute thus, insisting that it was the work of Mary (Furet 1989, 93).

Among the key elements that led Marcellin Champagnat to found the Marist Brothers, it is worth noting his experience teaching the catechism to the children of his village during the seminary vacation period, the lack of good teachers in rural areas and the context of insecurity and new order of values experienced by post-revolution France (Furet 1989, 23):

Marcellin Champagnat had from a very early period thought of creating a society of Brothers because of the difficulties he had encountered in his own education. And he would commit himself to the Marist project on condition that his confreres recognised his vocation as one proper to a man who regretted his lack of early education and who had received only a superficial Christian formation in his family and his parish. (Lanfrey 2015, 43)

Over the next few years, the Institute grew, and Marcellin Champagnat had to think of another space to accommodate all the Brothers. He decided to build a larger house, renaming it Notre Dame de l’Hermitage, on the banks of the Gier River in Saint Chammond (Furet 1989, 120). The new house was built by Marcellin Champagnat himself and the first Brothers², with the support of local residents and other benefactors who assisted with labour, financial donations and material (Furet 1989, 131). This house gradually evolved into a building and went on to become the cornerstone of Marcellin Champagnat’s tenacity and the solid foundation for the future Institute. Marcellin Champagnat was sure that the enterprise was a work of God dedicated to the Virgin Mary, whom he called “Our Good Mother” (Furet 1989, 142).

As well as the construction of the Hermitage, Marcellin Champagnat took every action to help the Brothers and juniors to adopt the project as their own (Furet 1989, 476), helping them to develop a sense of belonging and to deliver their best to a project that would eventually impact the lives of thousands of people across the world. This approach was effective in maximising the attraction of more candidates to take on the vocation of Marist Brother.

Marcellin Champagnat had clearly understood that the mission of the Marist Brothers was “to make our Lord known and loved. . . is the aim of our vocation and the whole purpose of the Institute” (Furet 1989, 330) through providing an evangelising education to children and young people. The Marist Institute’s target audience are the children and young people of rural, vulnerable and marginalised communities whose quality of education and formation in the faith are weak or compromised because of lack of access.

we are close to young people in their actual life-situations, taking the risk of going into what may be unexplored areas where those in material and spiritual poverty await the revelation of Christ. In dealing with young people, we show a concern that is humble, simple, and forgetful of self. (Marist Brothers of the Schools 2011, 71)

² The term “first Brothers” refers to the first generations of Marist Brothers who lived with Father Marcellin Champagnat. Among them are Brothers Jean Baptist Furet and Sylvestre, the first two biographers of Marcellin Champagnat. There is also Brother François Rivat who took over the Marist Institute as Superior General on the death of Marcellin Champagnat (Author’s note 2021).

The Marist education style should be based on the love of God, which is to be present in each of the children and young people entrusted to the Marist schools. “To educate children well, one must love them and love them all equally” (Furet 1989, 538). That is why the motto Marcellin Champagnat adopted for the Institute was “All to Jesus through Mary. All to Mary for Jesus” (The International Marist Education Commission 2007, 51). Marcellin Champagnat understood education as an act of love. The characteristics of the Marist style of educating include presence, simplicity, family spirit, love of work, and following the way of Mary (The International Marist Education Commission 2007, 45).

The opening of the first Marist schools was challenging. The founding Brothers did not have much formation. Most of them were between 15 and 18 years of age and came directly from working in the fields (The International Marist Education Commission 2007, 21). Even so, Marcellin Champagnat did not lose faith in his project of the Marist Institute, believing it to be the will of God and a way to contribute to the education and evangelisation of children and young people, by putting all necessary efforts into the formation of the Brothers.

The Hermitage in Saint Chamond, France, is a perfect example of his commitment to the formation of the Brothers. Marcellin Champagnat took advantage of the school holiday period to bring all the Brothers together, providing them with a proper religious and pedagogical formation, as well as capacity-building in management (Furet 1989, 350). Marcellin Champagnat made the decision to live with the Brothers to ensure they received the support and formation necessary for the new mission they were all embarking on (The International Marist Education Commission 2007, 22).

1.10 THE EXPANSION OF THE INSTITUTE OF THE MARIST BROTHERS AROUND THE WORLD

Gradually, the Institute gained the confidence and recognition of the population and the number of requests from parish priests, bishops and mayors to open schools in communities increased (Zind 1988, 265). In France, the growing Marist presence was initially due to the lack of schools in the small inland communities, where traditional schools were not present. Attending to these cases was the priority for Marcellin Champagnat (Zind 1988, 217). In addition, Marcellin Champagnat agreed to open schools with a minimum initial presence of two Brothers instead of three, as was the requirement

of another teaching congregation, the Brothers of the Christian Schools (Zind 1988, 257). This contributed to small communities being able to bear the costs of maintaining the school and the Marist Brothers.

Growth of the Marist presence outside France occurred for various reasons. Firstly, in 1836, three Marist Brothers heeded the call and missionary spirit of Father Marcellin Champagnat and the first Brothers and went on assignment to Oceania, where the Church had entrusted missions to the Marist Fathers (Furet 1989, 202). This initial foray made it possible to open Marist Brothers schools and communities in various countries around the region. A second reason for growth outside France was due to the fact that Marist schools became recognised for their educational work, with invitations to found new schools beginning to arrive from other countries as well.

In addition, in 1901, with the secularisation process of schools and the French government's interest in ending Catholic schools in France, then Prime Minister Emile Combes issued a decree closing 135 of them (Lanfrey 2015, 336). This decree affected especially those Catholic schools still awaiting formal recognition and those issued from new foundations. Consequently, a large number of Marist Brothers were sent to other parts of the world yet to have a Marist presence. Many Brothers had already left France some years before, foreseeing the evolution of the country's position on this issue. As Lanfrey said:

in regard to exile, by far the easiest thing was to envisage each French Province having its own foreign works. The number of departures was rising even before the Institute was forced into it. Whereas previously some forty or so Brothers were sent annually to other countries, in 1901 the number was 94 and 131 in 1902. Obviously, the year 1903 was going to break all records—573 Brothers left Europe. (2015, 339)

Increasingly, the new foundations grew within France, and by 1872, the Marist presence spread to other parts of Europe, the region of Oceania, and Southern Africa, and the Marist presence also began emerging in other places. More recently, new foundations have been directly initiated by the General Government itself in order to increase the Institute's presence in regions such as Asia, where there are large numbers of children and young people, and their educational and spiritual needs are significant (Sammon 2006, 100).

According to Brother Seán Sammon (2008, 16), the Superior General of the Institute of Marist Brothers from 2001 to 2009, “the year 2006 saw the first of 150 brothers begin their orientation in a new mission *ad gentes* initiative aimed at Asia and

developed in response to a call by Pope John Paul II to religious congregations throughout the world”.

According to the archives of the Institute of the Marist Brothers (2021), the Institute is present in 79 countries on five continents, reaching more than 600,000 children and young people through 601 schools, 20 universities, 40 social centres, four hospitals, and six publishing houses (four producing educational material and two based inside universities). In addition, there are more than 72,000 laypeople who, together with the Marist Brothers, continue the Marist charism and mission in this third centenary since its inauguration.

The La Valla house in France is where the Institute was originally founded. After a full renovation, in October 2013, the house was reopened to pilgrims from all over the world, so that they could visit and experience the origins of the Institute. Michel Green (2017, 97) wrote about the new international reality of the Institute and its presence on all continents:

from one perspective, those who were now to come to this house were quite different from the two young men of that valley who had first taken up residence there on 2 January 1817. Now, they spoke many languages, came from many cultures, and their purview covered all five continents. The complexity of their institutions and the reach of programmes would have been unimaginable to the early nineteenth century inhabitants of la Valla. Their technology and resources would have bedazzled them. But in other ways they were the same.

1.11 THE DEMOGRAPHY OF THE MARIST BROTHERS IN THE 21ST CENTURY

According to the data of the General Secretariat of the Institute of the Marist Brothers³, as of 31 December 2019, the Institute had 2,831 Marist Brothers worldwide. In 1961, the total number totalled 9,997 Brothers, the historical high point. According to these figures, over a period of 58 years there has been a 71.68% decline in the number of Brothers.

Another important element to consider is the percentage of Brothers per age group. As of 2019, of the 2831 Brothers, 428 Brothers were in the 21-40 age bracket, the equivalent of 15.12% of the total. In the 41-64 age bracket, the total number of Brothers

³ The data from the General Secretariat was accessed through the Institute of the Marist Brothers' internal data management system.

was 744, representing 26.29% of the total. Finally, Brothers over 65 totalled 1,659, equal to 58.6% of the total number of Marist Brothers in the Institute.

The data presented above reveals two important concerns regarding the number of Marist Brothers in the Institute. The first is the considerable decline in the number of Marist vocations and the second is the ageing of its members. Among the main reasons credited for the decline are the renewed understanding of the Christian vocation since Vatican Council II and the concomitant focus on the lay vocation, together with a growing secularization. As a consequence of this decline in the number becoming Marist Brothers, the ageing of the Institute's members has rendered the age profile of the Institute particularly challenging in the current context.

In particular, this is a period characterised by many historical changes that directly affect the Institute and the Marist charism. Brother Seán Sammon (2008, 17) expresses this phenomenon in the following way:

responding as an Institute to events in history and the dramatic change in attitude taking place in many parts of our world during the years following Vatican II, we may not have noticed fully some other powerful but less obvious forces at work shaping our understandings about the age in which we are living. It is to some of these developments that we now turn our attention.

It is important to note that even though the number of Brothers has been significantly reduced, the Marist mission itself has grown exponentially. In addition to new educational activities in countries where the Marist mission is already well-developed, new initiatives are being fostered in countries where the Marist presence has been established more recently. The reason for the growth in mission today is largely due to the increasing presence of the laity in the Marist life and mission.

Given this reality, sharing the Marist charism with the laity takes on a particular urgency. The Institute needs to reflect on the place and role of the Brothers and the laity in the life and mission of the Marist Institute. A continued effort to pave the way of communion and co-responsibility around the charism and the Marist Institute will be essential for the latter's continuity and vitality. To this end, the formation of prophetic and collaborative leaders capable of helping the Institute to respond to the challenges and calls of the world and the Church in today's context is of fundamental importance. As Sean Sammon describes it:

contemporary religious life has not yet been fully renewed nor has our Marist way of living it. And that outcome is due neither to ill-will nor to a lack of trying. But genuine

renewal is not a state of being but rather a particular way of living out the gospel of Jesus Christ. (2008, 22)

1.12 ORGANISATION OF THE INSTITUTE OF THE MARIST BROTHERS TODAY

To foster better leadership and governance of the Marist Institute, two levels of government and management and one level of institutional cooperation were established. The first of the two levels are the Administrative Units, also called Provinces and Districts, and the second level is that of the General Government based in Rome, in Italy. To facilitate the cooperation between the Administrative Units, Marist Regions were created.

1.12.1 Administrative Units

The Administrative Units are also called Provinces and Districts. This form of organisation aims at greater proximity and the “inculturation” of the Institute within a given local reality, as well as the empowerment of local Marist leaders to carry out the life and mission aligned with the Marist charism. In all, there are 26 Administrative Units, of which 23 are Provinces and three are Districts (Institute of the Marist Brothers 2021).

According to Article 126 of the Constitutions and Statutes of the Institute of the Marist Brothers (Marist Brothers of the Schools 2011, 109), a Province and its government are defined thus:

the Province is an administrative unit composed of a number of houses whose personnel and material resources are sufficient to assure an autonomous existence. It is governed by a Provincial Superior.

Article 127 of the same document (2011, 109) defines a District and its government:

the District is an administrative unit comprising a group of houses bound by common interests, but not having the requirements necessary to become a Province. It depends directly on the Superior General or on the Provincial Superior and is governed by a District Superior.

Further, according to the Constitutions and Statutes (Marist Brothers of the Schools 2011, 123), in Article 143, both the Provincial Superior and the District Superior

govern their Administrative Units with the support of a Council. The responsibilities of the Provincial and the District Superior and their respective Councils relate to all aspects of the life, mission and management of the goods of their respective Administrative Units.

1.12.2 Marist Regions

The Administrative Units have been organized into six Marist Regions: Asia, Oceania, Africa, Europe, the North Arch (Arco Norte) and South America (Marist Brothers of the Schools 2011, 108) in order to promote and foster cooperation, integration and synergy in all areas of common interest (Figure 1). The Regions are neither civil nor canonical in nature. The Marist regions are forums of exchange where the leaders of the Administrative Units, with the support of other Marist leaders, define a common agenda for the projects and initiatives of regional interest. Decisions are usually binding.

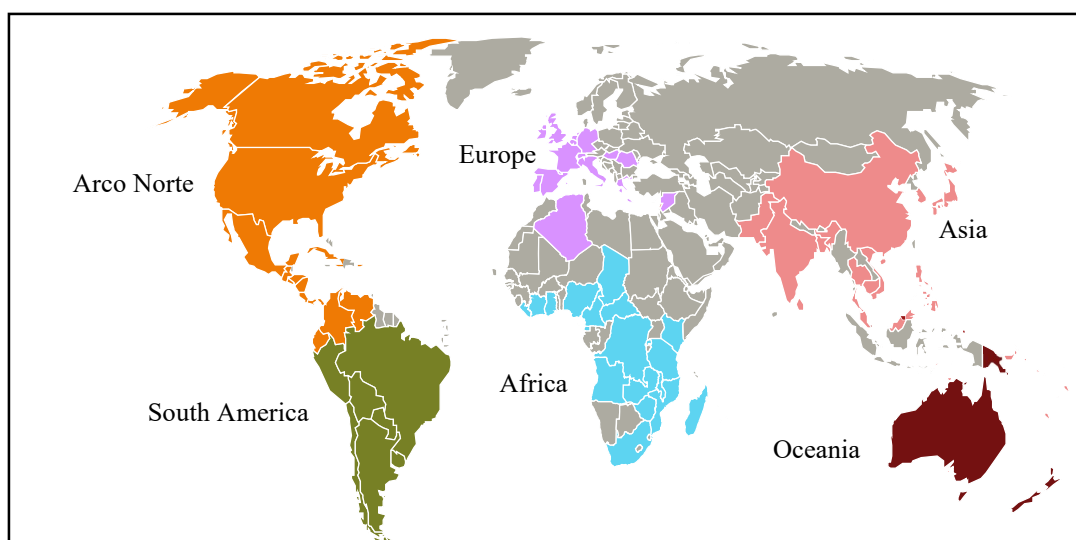


Figure 1. Map of the Marist Regions of the Institute of the Marist Brothers

Source: Marist Institute Communication Department, 2016.

The criteria of geographical proximity, mission focus and cultural similarities to avoid local dependence (Institute of the Marist Brothers 2016) were used to define the regions. The exception is the Arco Norte region which, due to its complexity, extends from Canada to Colombia. The configuration of the Arco Norte has contributed to a more balanced distribution and cooperation between the eleven Administrative Units present in the Americas.

1.12.3 General Government

The General Government of the Institute is composed of the Superior General, the Vicar General and six General Councillors, all elected by the General Chapter (Marist Brothers of the Schools 2011, 111–2). The Constitutions and Statutes (2011, 114), in Article 138, state that: “The General Chapter is an assembly representative of the whole Institute. It is an expression of the participation of all Brothers in the life and mission of the Institute, as well as of their co-responsibility in its government”.

The Superior General is the successor of the Founder of the Institute, Father Marcellin Champagnat. His mission is to care for all the Brothers, their union with Christ and their mission, as well as accompanying their commitments as Marist religious devotees. The Superior General has direct authority over all the Brothers, Administrative Units and houses according to Article 130 of the Constitutions and Statutes (2011, 111) of the Institute.

The Vicar General is the Superior General’s closest collaborator. He replaces the Superior General in cases of absence or when the latter cannot carry out his mission completely or partially (Marist Brothers of the Schools 2011, 112). The Vicar General, together with the General Councillors, collaborates directly with the Superior General in the government of the Institute (2011, 113).

To support the Institute’s Government in its mission, a series of Secretariats and other departments were created (Institute of the Marist Brothers 2019, 47–61). The Education and Evangelisation Secretariat was created to care for the Marist initiatives relevant to its title. The Secretariat of Solidarity was developed to look after the defence and promotion of children’s rights, as well as solidarity projects engaging with marginalised communities and issues of an ecological nature. In addition, a “Brothers Today” Secretariat was created to attend to all formation processes and the accompaniment of the Marist Brothers’ vocations and communities. Finally, a Marist Laity Secretariat was created to accompany the lay Marist vocation at the institutional level.

The organisation seeks to respond to the Strategic Plan developed for this period by the General Administration with the support of all Administrative Units. An organizational flow chart is outlined below (Figure 2):

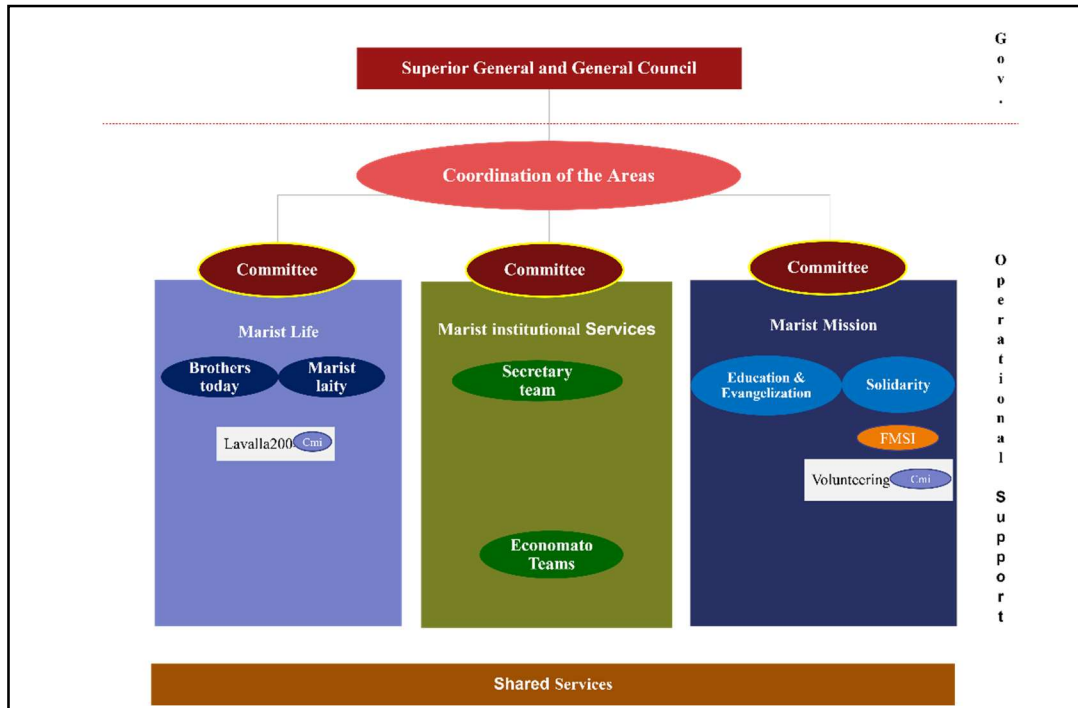


Figure 2. Flowchart of the General Administration of the Institute of the Marist Brothers
Source: Marist Institute Communication Department, 2019.

Some departments that are more focused on cross-cutting themes have also been created such as the Collaboration for Mission, International (CMI) responsible to coordinate international volunteer programmes. Several working groups and commissions have been set up to support other departments and projects, more specifically related to the Institute's financial sustainability and assets, as well as to its spiritual heritage.

1.13 THESIS STRUCTURE

In order to appropriately organise this mixed methods case study, the thesis has been divided into the following nine chapters:

Chapter One, the introduction, presents the context of this mixed methods case study, the main concepts underpinning the research problem, as well as general and specific objectives, and the justification for case study development.

Chapter Two explores the charism and leadership of Marcellin Champagnat in his founding of the Institute. The chapter covers Marcellin Champagnat's religious thought and spirituality and how they characterised his era, as well as the circumstances and key factors that contributed to the development of his charism, leadership and the founding of the Institute.

Chapter Three discusses the Marist charism and the challenges to its continuity and vitality, highlighting the nature of the term “charism” and its advent in the Church’s religious Institutes. It also identifies the major characteristics of the Marist charism and the challenges faced by religious Institutes in transmitting their charism.

Chapter Four introduces prophetic and collaborative global leadership in the context of the world, the Church and the Institute of the Marist Brothers; the main concepts of a prophetic and collaborative global leader, and finally, the important elements of leadership formation.

Chapter Five presents the methodological trajectory of this case study, with regards to the identification of essential elements for the Institute to be able to form prophetic and collaborative leaders who can contribute to the continuity and vitality of the Marist charism. The chapter sets forth the methodological procedures used in the study such as the collection, analysis and interpretation of qualitative and quantitative data.

Chapter Six analyses the quantitative and qualitative data obtained from an online questionnaire on the Administrative Units leaders’ perceptions regarding the formation of Marist leadership, reporting on how these leaders view the General Council’s role in ensuring the formation of prophetic and collaborative leaders. It also outlines the strengths, challenges and current needs in leadership formation processes designed to contribute to the continuity and vitality of the Marist charism.

Chapter Seven presents the qualitative data collected through semi-structured face-to-face interviews discussing the role of the General Council in guaranteeing the formation of prophetic and collaborative leaders. It also presents the perspectives of the members of the General Council on the strengths, challenges and needs of current Marist leadership formation processes that are committed to the continuity and vitality of the Marist charism.

Chapter Eight considers the findings of this mixed methods case study from the analysis of the quantitative and qualitative data collected in response to the research problem and objectives and includes a discussion in relation to existing research literature. The chapter presents the current strengths, challenges and opportunities for Marist leadership formation processes, the role of the General Council in ensuring the formation of prophetic and collaborative leaders, and the key elements for the formation of prophetic and collaborative global leaders who are committed to the future of the Marist charism.

Finally, Chapter Nine draws' conclusions and presents final considerations derived from the findings of this mixed methods case study. In accordance with the case study's problem and objectives, the research conclusions and recommendations to respond to findings are presented, the limitations of the research are acknowledged, and finally, suggestions for future research with regard to deepening the research theme are made.

CHAPTER TWO

THE CHARISM AND LEADERSHIP OF MARCELLIN CHAMPAGNAT IN THE FOUNDATION OF THE INSTITUTE OF THE MARIST BROTHERS

2.1 INTRODUCTION

Throughout the history of humanity, innovative proposals have always intertwined with the determining factors, arrangements and provisions of their given epoch and context. Marcellin Champagnat was such “a child of his time” and a leader capable of influencing people and impacting realities. The purpose of this chapter is to examine in more depth the religious thought and spirituality which characterised the era in which Marcellin Champagnat lived, as well as the key events and factors which helped shape his charisma and leadership, leading to the founding of what would become the Institute of the Marist Brothers.

Therefore, this chapter offers an analysis of the most relevant social, religious and ecclesial elements in order to understand Marcellin Champagnat’s charisma and the founding of the Institute of the Marist Brothers. It is worth emphasising that different perspectives described in this chapter intersect in a unique and integrated way, and that this approach has the didactic function of facilitating analysis.

2.2 MARCELLIN CHAMPAGNAT’S HISTORICAL AND FAMILY FOUNDATIONS

It was in a context of transformation characterised by the French Revolution and the Enlightenment that Marcellin Champagnat was born and raised (Zind 1988, 41). The social context in which Marcellin lived had a significant impact on his formation and on the development of his leadership and entrepreneurial skills. Later, this would result in the founding of an Institute capable of impacting and transforming the lives of millions of children and young people around the world. The environment of Marcellin Champagnat’s homeland, his father’s political activities and the education and religious teachings of his mother and aunt, were other key elements that influenced his personal development and abilities (Farrell 1984).

Marcellin Champagnat's place of birth was very far from the great political and economic centres of France. Rosey was a small farming village just a few kilometres from the municipality of Marllhes, situated in the Pilat Mountains (Furet 1989, 1). It was a region rich in forests and streams. The rugged geography, abundance of pastures and harsh winter favoured the raising of sheep, which was one of Marcellin Champagnat's main occupations while living with his parents. It was this same environment that helped shape and develop Marcellin Champagnat's character and his qualities of leadership, entrepreneurship, tenacity, adaptability and strength.

As a child, Marcellin Champagnat was directly involved in the family activities. He helped his father in the family-owned wheat mill business, and later, as a teenager, he was responsible for tending a flock of sheep, some of which belonged to Marcellin Champagnat himself. While still a young man, he learned to take responsibility for such commitments, as well as to use the sheep entrusted to him to conduct business negotiations with local farmers (Zind 1988, 55).

His father, Jean Baptiste Marcellin Champagnat, had a very high level of schooling compared to his countrymen resulting in his appointment to the leadership of some important functions in the municipality of Marllhes (Lanfrey 2015, 31). Marcellin Champagnat's father was recognized for his moderation, patience and above all for his political tact. He was one of the leaders of the government during the French Revolution. For the family, he was a merchant and farmer (Farrell 1984, 9).

These characteristics were later reflected in Marcellin Champagnat himself and were instrumental in the founding of the Institute of the Marist Brothers (Furet 1989, 2). One of the Institute's key elements was the introduction of manual labour as an important value in religious life and in the mission carried out by future Marist Brothers. According to Furet (1989, 2), "providence destined him to be the Founder of an Institute whose special character would be humility and simplicity, and whose aim would be the Christian instruction of country children".

Marcellin Champagnat was born into a family notably dedicated to more orthodox Catholic practices, inheriting a fervent devotion to Mary, alongside other devotional practices, from his family (Furet 1989, 3–4). The presence of two women in his home—his mother, Teresa Chirat, and his aunt and father's sister, Louise Champagnat—was another contributing factor to Marcellin Champagnat's formation (Farrell 1984, 13). Teresa was a woman of total integrity, unshakable faith and love of labour. "Madame Champagnat was a person of strong character, who managed her home and her household

with thrift and perfect order. Her solid piety was reinforced by all the virtues belonging to a faithful spouse and a worthy mother” (Furet 1989, 2).

During these years of revolution, France was undergoing a profound series of transformations that would in time impact the whole world. Marcellin Champagnat’s aunt Louise, who was almost three years older than his father, was a religious Sister of Saint Joseph, expelled from the convent by the Revolution. She lived with Champagnat’s family, educating the young Marcellin in the Catholic faith—an important influence in his formation. According to Furet (1989, 5), “in this way Marcellin was educated and formed to piety by his mother and his virtuous aunt, being kept at a distance from harmful company”.

The social and political context of the Revolution, the isolation of Marcellin Champagnat’s village and, above all, the poor quality of education and inadequate preparation of his teachers, were all decisive factors in his childhood. According to Furet:

on his first day of attendance, as he [Marcellin] was very timid and didn’t leave the place he was given, the teacher called him to his side to read; but just as he arrived, another pupil took up a position in front of him. Then the teacher, somewhat angered and perhaps that he would please young Marcellin, vigorously boxed the ears of the child who wanted to read first and sent him off sobbing to the back of the room. (1989, 6)

For this reason and even at the insistence of his family, Marcellin Champagnat did not return to school. Instead, he took over many of the farming tasks, especially caring for the sheep. All these occupations, seasoned by his creative spirit and his taste for manual labour, forged a special temperament in Marcellin Champagnat during his childhood. His aunt, taking refuge in the family home in order not to be persecuted by the revolutionary movement, was instructed to assist him in his literacy. However, she did not achieve much success on this front (Zind 1988, 54).

Another remarkable experience for Marcellin Champagnat was in his preparation for his first communion. His catechist was Fr. Laurent, a very zealous priest, but without pedagogical preparation. Among the criticisms attributed to Fr. Laurent is that he would give nicknames to his students, humiliating them in front of the others. This had a strong impact on Marcellin Champagnat, who would later use these examples to teach the Brothers his vision of how to educate and lead catechesis (Furet 1989, 6).

After the revolution and with the rise of Napoleon Bonaparte, the power and influence of the Catholic Church began to decline. While Napoleon gave to the Church certain freedoms, he used it to bolster his own authority and power. In 1803, Napoleon’s

uncle, Cardinal Joseph Fesch was named Archbishop of Lyon, France (Furet 1989, 8). One of Cardinal Fesch's first actions was to boost the minor seminaries. The clergy thus began the search for new vocations for their seminaries, launching a series of vocational campaigns, which is how they arrived at Marcellin Champagnat's house. Among his brothers, Marcellin Champagnat showed some interest in the proposal to prepare for the priesthood, and the priest suggested, "My boy, you must study Latin and become a priest. It is God's will!" (Furet 1989, 9).

2.3 THE PRIESTLY FORMATION OF MARCELLIN CHAMPAGNAT AND THE FOUNDATION OF THE INSTITUTE OF THE MARIST BROTHERS

Marcellin Champagnat entered the seminary of Verrières on 1 November 1805, and although he failed in his first year (Ronzon 2010, 43) on account of not being fully literate, he went on to succeed in later years. Between 1805 to 1813, the seminary at Verrières held between 80 to 100 seminarians. The school was an extension of a presbytery school that had been started in 1803 at Firminy near St Etienne and eventually moved to Verrières. It was during these years that the seminary underwent substantial transformation, and that Marcellin Champagnat began his studies for the priesthood (Farrell 1984, 25; Lanfrey 2015, 34).

On 2 November 1813, Marcellin Champagnat moved on to the Major Seminary of St. Irénée in Lyon, where he showed considerable academic progress. On 6 January 1814, he was ordained a sub-deacon (Ronzon 2010, 52) and finally, on 22 July 1816, at the age of 27 and together with his companions, Marcellin Champagnat was ordained a priest in the Cathedral of Lyon (Ronzon 2010, 55).

During his time in the seminary, Marcellin Champagnat was influenced by the prevalent Catholic theological and spiritual thoughts of the time, and especially by the French clerical reform (Farrell 1984, 46). Like a great number of priests and religious figures from that era, he internalised the idea of an integration between catechesis and education. For Marcellin Champagnat, evangelising through education was a way of responding to the precariousness or abandonment of a formal education for children and young people and the need for evangelisation.

Soon after his ordination as a priest, Marcellin Champagnat was appointed as parish priest of La Valla, a small parish in the then district of Saint-Chamond (Loire) (Furet 1989, 34). According to Furet:

the people of La Valla were good folk and full of faith, without sophistication or education. Several factors accounted for their ignorance of the church, the chief of them being the very nature of the landscape. Most of the inhabitants lived scattered and lost, as it were, in the lonely spots that were hard to reach. Hence, they rarely came to church. (1989, 35)

Strengthened by the theological and spiritual convictions acquired during his time in the seminary and aware of the challenges faced by the children and young people of his parish, Marcellin Champagnat founded the Institute of the Marist Brothers on 2 January 1817. The foundation of the Institute was ultimately motivated by the visit Marcellin had made on 28 October 1816 to a dying 17-year-old boy named Jean Baptiste Montagne. This young man had no knowledge of God and the conditions in which he lived were very precarious (Farrell 1984, 55). All of this led Marcellin to make the decision to begin the Institute. His aim was to promote the education and evangelisation of children and young people (Furet 1989, 61). He himself often repeated that the purpose of the Institute of the Marist Brothers was “to form good Christians and good citizens” (Furet 1989, 535).

2.4 THE HISTORICAL AND SOCIAL INFLUENCES THAT IMPACTED MARCELLIN CHAMPAGNAT

The historical period during which Marcellin Champagnat lived presented a complex political, cultural and religious context, which in turn impacted upon his vision of the world and consequently, his leadership and the development of Marist charism.

French society at the end of the 18th century contributed to his approach to the various intertwining social and religious milieu in which Marcellin found himself. He was born in the same year that the French Revolution began and he lived his life amongst the turmoil of the early years of the revolution and the consequences of the various reforms and military battles on the French population during the regime of Napoleon Bonaparte (Lanfrey 2015, 47–53; Ronzon 2010, 19).

This scenario was the direct result of conflicts between the key religious and civil powers, motivated by the scientific and mercantile revolution of the 18th century and by the entangling power and authority of the Catholic Church in civil matters on the other (Farrell 1984, 40). This situation triggered the need for a market that could absorb the productive innovations and the increase in profitability. In this sense, the Roman Catholic Church was perceived as an obstacle to commercial and industrial development, both

because of its doctrine and its power, especially in Europe, where it was the largest landholder (Farrell 1984, 1–5). In the specific case of France, the overthrow of Catholic authority was necessary to consolidate the conquests of a new economic arrangement. In this way, the French Revolution represented a civil power that hastened the collapse of the religious power of the Church (Lanfrey 2015, 19).

As a result, there was a mass dismissal of bishops, priests, and religious sisters and brothers, as well as the seizure of the Church's economic assets on French territory. In certain regions and in specific periods, persecution and violence were waged against priests and other religious leaders of the Catholic Church (Farrell 1984, 57). One of the most evident consequences of this clash was the abandonment of the Catholic churchgoers, who remained without a formal parish community, many of them preserving their religious traditions within the framework of their own homes (Lanfrey 2017a, 209).

The struggle against the hegemony of Catholic ecclesial power took place on yet another front—that of doctrine and theology. In this sense, reformist theory which envisaged regulation of the capitalist economy and strove for harmonious development of the state, as well as religious, the reform functioned as the religious component of the commercial, scientific and industrial revolutions (Lanfrey 2015, Tabak 2012, 50; Wuthnow 1985). The differences in position between Catholics and Protestants throughout the various countries of Europe made this evident. Divergent understandings of the biblical hermeneutics of theology on grace and prosperity, as well as the encouragement of a freer reading of the Bible with an emphasis on individual interpretations of its teachings, are evidence of this tension between Catholics and Protestants (Wuthnow 1985). Such practices, encouraged by Protestants, were particularly instrumental in the disinhibition and the disengagement of the faithful from Catholic doctrine, as the latter preached the authority of interpretation by ecclesiastical representation and the theology of detachment and imitation of a poor Christ as the sign for establishing the Kingdom of God (Lanfrey 2015, 137; Phillips 2018; Weber 1996).

Another important feature of this period is the emergence of a formal mass education of children and youth. Although incipient and financed by the private initiative of families, it represented the embryonic approach to considering education as a national system. Allied to this was the evidence of an impoverishment and abandonment of part of the children and youth of France, especially in the interior of the country. In this context, the Church saw a great opportunity for action and influence, combining social action through education with religious and catechetical formation. For this reason,

countless Catholic religious leaders turned their attention to this unique opportunity to regain the vigour of the Church's doctrine and spirituality. During this period, France saw the emergence of a large number of religious congregations, mainly dedicated to formal education (Lanfrey 2013, 91–3; Lanfrey 2017a, 413; Zind 1988, 171–3).

The conflict in which the Catholic Church was involved became observable in France during the period when Marcellin Champagnat began his seminary studies. Adding to this conflict was the Church's adherence to the principles and mindset of the Council of Trent (1545) which led to a radicalism on the part of the Church in its efforts to regain Catholic hegemony in the country. In keeping with this specific historical moment, religious entities represented a solid foundation for facing the new difficulties that emerged (Lanfrey 2015, 135).

Arguably in this interpretative horizon, the Christian-Catholic concept of the 18th century is still strongly marked by the vision of the Counter-Reformation and the Church's "Christianising utopia" (Lanfrey 2015, 136). Marcellin Champagnat was totally immersed in this context. Therefore, it is possible to perceive a very direct correlation between the social and religious phenomena of the time and the dimensions developed by Marcellin Champagnat, especially in his spiritual experience, his charism and foundation of the Institute. Particularly in the spiritual dimension, his great trust in God is noted, as well as his leadership and enterprising spirit in relation to the political and revolutionary movements of the time.

2.5 SPIRITUALITY IN THE 18TH AND 19TH CENTURIES AND ITS INFLUENCE ON MARCELLIN CHAMPAGNAT

Understanding social and religious movements, and especially the French spirituality of the late 18th and early 19th centuries, helps to fully understand the thinking, spirituality, leadership and charism of Marcellin Champagnat. To achieve this, it is necessary to consider the 12th century, which was strongly influenced by the converging movements of the turn of the first millennium of the Christian era. The hegemony of the Catholic Church in Europe, together with the era's overarching intellectual and philosophical restructuring, paved the way for a Christianity with Enlightenment overtones, which replaced the Christendom of the Middle Ages, in turn resulting in a new configuration of the Church.

Saint Bonaventure, who dates back to this period, greatly influenced Saint Francis de Sales (1567-1622), whose spirituality in turn had a significant influence on Marcellin Champagnat. Three important aspects of this period were adopted by Marcellin Champagnat and become elements of his vision for the Marist Brothers: prayer, simplicity and humility. These elements can be identified particularly in St. Bonaventure's case, given his affirmations that the human spirit grows in the active love of God and neighbour and is expressed in the virtues of the Gospel based on the roots of humility (Hayes 1999, 29).

However, in terms of spiritual movements, the 17th century, which coincides with the rule of Louis XIII of France, is of particular note. The efforts of great exponents of Catholic spirituality, such as Benoit de Canfield (1562-1611), Pierre de Berulle (1575-1629), Charles de Condren (1588-1641), Jean Eudes (1601-1680) and Jean-Jacques Olier (1608-1657) contributed to establishing a new environment where piety and interior life were grouped under the title of the French School of Spirituality (Jedin 1978).

Francis de Sales, despite belonging to the 17th century, presented a movement that was original and distinct from the French School. According to Bourmaud:

the spirituality of this saint [St. Francis de Sales] is above all eclectic and pragmatic, with a breadth and lack of systematisation that may contribute to a lasting influence among future generations. . . . The saint's work on personal conscience, in order to do everything to please God, demonstrates his masterly role as spiritual director, the first of a long series of directors who gave French spirituality its psychological and practical character. (2020)

Through a renewed educational and missionary spirit, this golden period of French theology and spirituality had a strong influence on Christian fervour and charitable works. In the 17th century, the forms of prayer and devotion multiplied, as well as a certain opposition to mysticism due to problems linked to Quietism (Downey 2003, 438), a spiritual current that sustained the prevalence of mysticism over asceticism and contemplation over meditation. However, even before this period, the new social and power configurations that had begun to be established on the old continent around the 14th and 15th centuries called the influence of the Church into question, giving rise to other Christian approaches that were linked to the interests of groups and nations, especially European ones.

In this sense, the period preceding that of Marcellin Champagnat was a time of great spiritual change for the Church and for France. In particular, the 17th century is the time when the so-called "French School of Spirituality" grew and developed. Another

major influence on Marcellin Champagnat was St. John Baptist de La Salle (1651-1719), founder of the De La Salle Brothers. According to McCarthy (2018, 17), Francis de Sales' *Treatise on the Love of God* significantly influenced Marcellin Champagnat's life, spirituality and charism. An example of this is Marcellin Champagnat's response to a Marist Brother who asks him for a book on the love of God, whereby Marcellin Champagnat took *Treatise on the Love of God* from his bookshelf, telling the Brother "here is an excellent one" (Lanfrey 2013, 18).

2.5.1 Francis de Sales and the French School of Spirituality⁴

Even though St. Francis de Sales is not featured as a representative of the French School of Spirituality, he was arguably a significant and relevant figure of the 17th century, whose work spearheaded the discussion on the question of the devout life and the little virtues (Ancilli 2012, 911). Both St. Francis de Sales and the French School of Spirituality greatly influenced the Church into which Marcellin Champagnat was born and raised. Consequently, Marcellin Champagnat would later adopt important spiritual elements from that time of his life that would shape the Marist charism.

Brother Francisco Chagas Ribeiro, in his study of Marcellin Champagnat's library, noted the presence of the biography written by Bishop Camus on Saint Francis de Sales called *Esprit de St. François de Sales*, as well as the books *Introduction à la vie devote* and *Le directeur spirituel des âmes dévotes et religieuses*, both written by St. Francis de Sales (Ribeiro 1989, 32).

Another strong influence was Francis de Sales' prayer *Pleine de confiance* to the Virgin Mary, which marked the life of Marcellin Champagnat and the first Marist Brothers:

we greet you, sweet Virgin Mary, Mother of God, and we choose you as our dear Mother. Deign to accept us as your children and servants. We want no other mother, no other support. We ask, O good, loving and sweet Mother, to kindly remember that we are your children: you most powerful and we poor, vile and petty creatures. We also beseech you, dear and sweet Mother, to govern us and defend us in all our actions, for we are poor, sick and needy, in great need of help and protection. (Maristes 1948, 221–2)

⁴ The term "French School" is not univocal, nor is it accepted without restrictions. The term "French School of Spirituality" is often used to refer to a series of spiritual movements in France led by various personalities: the French Jesuit School—Lallemant (1635); Oratorian—Cardinal Bérulle (1629) and Sulpician—Jean-Jacques Olier (1657) (Ancilli 2012, 917).

Aside from the French School of Spirituality, there were different and varied spiritual currents throughout 17th century France. Alongside the old schools of spirituality that flourished—Benedictine, Carthusian, Cistercian, Augustinian, Franciscan, Dominican—the Jesuit and later the Salesian schools emerged. It is worth noting that the Salesian school saw widespread development in France, thanks to the numerous translations and re-editions of the life of St. Francis de Sales. A new renaissance was similarly enjoyed by Carmelite spirituality, supported by the works of its reformers, St. Teresa d'Avila and St. John of the Cross. In addition, of vital importance were the spiritual currents with a strong lay character, marked by the emergence of various orders, including Marian congregations such as the Society of Mary, also known as the Marianists (1817), the Marist Sisters (1823) and the Missionary Sons of the Immaculate Heart of Mary (1849), also known as the Claretians (Thompson 2013). The French School of Spirituality also had its lay representatives such as Bernières and Renty, as well as its Jesuit representatives, including Saint-Jure and Lallemand (Deville 1987, 11–2).

Marcellin Champagnat's religious understanding has several converging elements, including those of the French School of Spirituality and of Francis de Sales, as well as other advocates of spirituality and thought from the era. According to Lanfrey, Marcellin Champagnat and the first Marist Brothers “ground their missionary, pastoral, catechetical and pedagogical thinking in the tradition of the Jesuits and the French School of Spirituality” (2017, 410). These elements are foundational in the development of the Marist charism and the Institute of the Marist Brothers.

2.5.2 Elements of the Spirituality and Religiosity of the 17th and 18th Centuries that Influenced Marist Spirituality and the Marist Charism

There are five essentials of the spirituality and religiosity of the 17th and 18th centuries that have significantly impacted the development of Marist spirituality and the Marist charism. They are briefly described below:

1. Sense of the Greatness and Holiness of God

According to the mindset of the period, man was created to love God, man owes his existence to Him, and it is in the adoration of Him that man finds his reason for existence and full realisation. For Marcellin Champagnat, the mission of the Marist

Brothers would consist in “reminding children constantly how much Jesus loved them and how much, therefore, they were obliged to love him” (Furet 1989, 331).

2. *Centrality of the Incarnate Word*

God is the ultimate reason for human life and the closeness of His presence to man is revealed in the Incarnate Word. Jesus Christ is the essential manifestation of God; in him God draws near to humanity and lives the whole human experience, with the exception of sin. In the Incarnation, God draws near to human experience. He also reveals Himself, makes Himself known and shows which is the path to fullness for human life. Schneider (1999, 17) states that “the Incarnate Word is the essential manifestation of God: in it, God, incomprehensible, makes Himself understood, God ineffable makes Himself heard, God invisible, makes Himself seen”.

3. *Contemplation of the Life of Jesus*

Jesus is the perfect manifestation of God for humanity. Thus, the contemplation of the mysteries of His life reveals the path towards the fulfilment of God’s plan for every man and woman. In contemplating the mysteries of Jesus’ life from the perspective of his childhood, mission, passion, resurrection and ascension, humanity feels called to enter into a relationship of closeness and intimacy with Jesus and thus imitate his teachings. For Côté (1964, 3), “the Christian life is in no way different from the very life of Jesus within us, as it is instilled in our hearts by his Holy Spirit”.

4. *Devotion to Mary*

Devotion to Mary springs from the understanding that she is the model of the Christian life, for she is intimately linked to the mysteries of Jesus’ life. For Côté (1964, 13), “Jesus would have wanted to offer his mother’s presence to the disciples in the faith and help them to follow the mission He had entrusted to them”. For the community of the faithful, Mary serves as the intercessor and model of an authentic Christian life, in conformity with the teachings of Jesus. According to what was expected of Christians at that time, approaching Mary and asking for her intercession was the way to Jesus and to a full Christian life. The Marist motto, conceived by Marcellin Champagnat, attests to

this understanding of the era: “All to Jesus through Mary, and all to Mary for Jesus” (Furet 1989, 332).

5. *The Question of Practising Christian Virtues*

The practice of Christian virtues, strongly affected by the Spiritual Exercises as described by St. Ignatius of Loyola, highlights the role of conscience and will in accommodating life in the imitation of Christ. According to Br. John Baptiste Furet:

in founding his Institute, Father Champagnat had more in mind than providing primary instruction for the children or even, than teaching them the truths of religion; he wanted to educate them, in the sense that we have just explained. “If it were only a question”, he said, of teaching the children secular subjects, the Brothers would not be necessary, because secular masters could do that; if our only aim were to give religious instruction, we could confine ourselves to being simply catechists, bringing children together for an hour each day and getting them to recite their Christian doctrine. But we aim at something better; we want to educate the children, that is to instruct them in their duty, to teach them to practise it, to give them a Christian spirit and attitudes and to form them to religious habits and the virtues possessed by a good Christian and a good citizen. (1989, 535)

As such, practising Christian virtues and living them on a daily basis means acting according to the impulse of the divine motions. For people in the 17th and 18th centuries, this was the guaranteed way to walk the paths of perfection.

2.6 EXPRESSIONS OF MARCELLIN CHAMPAGNAT’S THOUGHT AND SPIRITUALITY IN THE MARIST CHARISM

Marcellin Champagnat’s concept of education and spirituality, which was influenced by the context of his era, had a determining influence on the construction of the Marist charism, as well as on the foundations of the spirituality and mission of the Institute of the Marist Brothers. Within this context, it is possible to identify the four main expressions of his thought, experience and spirituality that helped shape the Marist charism.

2.6.1 The Presence of and Trust in God

Some traits of Marcellin Champagnat’s leadership, spirituality and charism can be found in his letters. According to what was expected of Christians at that time,

approaching Mary and asking for her intercession was the way to Jesus and to a full Christian life.

According to the *Water from the Rock* document, “Marcellin was also deeply aware of the love of Jesus and Mary for him and others. This inspired in him the passion of an apostle. He dedicated his life to sharing this love” (Institute of the Marist Brothers 2007, 23–4).

Marcellin Champagnat wrote no treatise on prayer or on his experiences of God. However, the practice of the presence of God was one of the sources of his spirituality. Writing to Br. Avit and showing concern for the latter’s spirituality, Marcellin Champagnat recommends: “another good means of acquiring the religious virtues, as you well know, dear friend, is the practice of the holy presence of God, recommended by all the masters of the spiritual life” (Champagnat 1997, 512). In the same way, he tells Brother Basin, “walk every day of your life in the holy presence of God” (Champagnat 1997, 508).

In Brother Jean-Baptiste Furet’s biography of Marcellin Champagnat, a chapter is devoted to this subject. For Furet, Marcellin Champagnat’s “favourite exercise was the presence of God” because it “has been described by God himself as the shortest and most efficacious means of reaching perfection” (Furet 1989, 312).

According to Furet (1989, 319), the theme of the presence of God goes beyond a spiritual exercise of piety and presupposes a deep understanding of biblical themes that encourage delving deeply into God: “it is in God that we live and move and have our being” (Acts 17:28). For Marcellin, God is not something external or extraneous, but rather precedes him in love, gives reason for his existence, and offers meaning for his life and his mission.

The verbs “to live”, “to move” and “to exist”, in the quotation from the Acts, reveal three moments of the soul opening itself to the presence of God: first of all, life finds its full meaning, then it is led to move and communicate this presence that is full of meaning to others and, finally, existence is understood as a gift—a grace that is constantly sustained by God. According to Furet (1989, 314), Marcellin Champagnat practised “the exercise of the presence of God” by believing with “a firm and real faith that God is present everywhere, filling the universe with his immensity, with the works of his goodness, with his mercy and his glory”.

The first three places Marcellin Champagnat desired for his Brothers reveal this logic: the Crib, as the theological locus of the Incarnation and of the celebration of life;

the Altar, as the reason for the existence of a life consecrated to God; and the Cross, as the maximum expression of a love and a complete commitment, which makes the human being not close in on himself, but instead propels him towards the other, towards his neighbour (Institute of the Marist Brothers 2020a, 16).

2.6.2 Attention to Little Virtues

In the Catholic context, particularly in light of religious movements that emerged from the 12th century onwards, there is an incorporation of the responsibility of each person for the experience of faith and the following of Jesus. During the Middle Ages, “spiritual strengthening” led to pilgrimages of faith to holy places and at other times to defend the faith from perceived threats (Phillips 2018).

The new models of spirituality, such as St. Ignatius of Loyola, St. Teresa d’Avila, St. John of the Cross and St. Francis de Sales, among others, contributed to fostering new practices of religiosity, which found an ideal context in Europe of the 17th and 18th centuries. Mystical experience needed to be translated into a coherent experience present in the daily life of the faithful. Therefore, to be faithful to Jesus and his Gospel was translated into practicing acts of faith throughout the day.

For Marcellin Champagnat, the materiality of these acts of fidelity was translated into the practice of the little virtues, such as “indulgence, charitably pretending not to notice, compassion, holy joy, gentleness of spirit, charitable concern, affability, urbanity and politeness, condescendence, devotion to the common good, patience and balance of soul and character” (Moral Barrio 2017, 280–1). Marcellin Champagnat insisted on these daily practices and said: “Love the little virtues, practise them faithfully” (Furet 1914, 310).

In general, the external features of spirituality, which marked the daily living of little virtues, remained; however, they represented a refinement of medieval spirituality which moved into a dimension of interior incorporation, configuring a spiritual practice that was more adapted to the current context of tension and turbulence. These features greatly affected Marcellin Champagnat’s profile, leadership and charism.

2.6.3 Mary: “Our Ordinary Resource”

Another important aspect in the conception of spirituality in the 17th and 18th centuries is the reinterpretation of the presence of Mary in Jesus’ mission. At this time,

Mary had ceased to be venerated solely on the altars of the saints and had begun to have a fundamental role as protector and companion of the Catholic faithful throughout their daily journey. This conception of Mary had a decisive impact on the foundation of the Institute and on the development of the charism.

According to Mondoni, the “cult of the Blessed Sacrament appeared with great vigour (the feast of Corpus Christi was particularly propitious for the manifestations of this piety). Interest in devotion to the Virgin Mary followed suit, stimulated in particular by Marian congregations” (2002, 65).

The revival of Mary as an intercessor attained a degree of popularity, mainly because an identification existed between the people and the figure of the Mother of Jesus, as described in the Gospels. Salvation, once distant and highly demanding, became a tangible reality within everyone’s reach. Mary had become a model to be imitated, since she, a simple and ordinary person, was able to fulfil the Christian ideals to perfection. Therefore, all people who drew near to her could confidently count on her care and, by imitating her virtues, attain salvation.

As Mondoni points out, the spread of the cult and devotion of Mary was disseminated in 18th century France and throughout Europe by numerous congregations consecrated to the Mother of Jesus (Mondoni 2002, 65). Having received his formation in this context, Marcellin Champagnat also decided to establish a congregation of lay religious, with a strong Marian character, designed to provide a formal and religious education for children and young people. He called this congregation the “Little Brothers of Mary”. Before approving the religious institute founded by Marcellin Champagnat, the Church recognised the presence of Mary by using “Marist” as part of the title—that is to say, using an adjective that determined its most important characteristic. For Marcellin Champagnat, “the Little Brothers of Mary should strive to imitate their Mother in all her actions” (Furet 1989, 69).

Thus, Marcellin Champagnat’s devotion to Mary throughout his life became one of the Institute’s founding elements. Marcellin Champagnat insisted that the Marist Brothers “should work increasingly to copy her life by the imitation of her virtues” (Furet 1989, 67). Likewise, he insisted that the Brothers should strengthen devotion to Mary among children and young people attending the Marist schools (Furet 1989, 339).

Marcellin Champagnat brought devotion to Mary into his daily life and into the most relevant situations of his Institute. He said that the Institute had Mary as its “Good

Mother” and that, before making any decision or starting a new project, it would be necessary to place everything in her care (Furet 1989, 332).

Throughout his ministerial life, Marcellin had recourse to the intercession of Mary numerous times. Three such episodes have a prominent place in the tradition and history of the Brothers. The first episode concerns the Institute’s first great crisis of vocations in 1822. Faced with the possibility of the failure of the Institute, Marcellin Champagnat interceded to Mary for Marist vocations:

it is you who brought us together, in spite of the opposition of the world, to procure the glory of your divine Son; unless you come to our aid, we shall perish and like a lamp without oil become extinguished. But, if this work perishes, it is not our work that fails; it is yours, since you have done everything for us. We therefore rely on your powerful protection and we shall count on it always. (Furet 1989, 93)

The second episode was during the Revolution of 1830. Faced with political and religious instability, Marcellin Champagnat showed a clear evolution to the promise he made to Mary at the Shrine of Our Lady of Fourvière in Lyon, France. He no longer entrusted his foundation to a governmental recognition, but to the only royal capable of protecting them, Mary. From that year onwards, Marcellin Champagnat recommended a practice that would be incorporated into the Institute to this day: the recitation of the *Salve Regina* (Furet 1989, 342; Lanfrey 2015, 351).

Marcellin found recourse in his “Ordinary Resource”, and in his circular to his “Little Brothers of Mary”, he told them, “Do not be afraid, we have Mary to defend us. All our hairs are numbered, not one of them will fall unless God permits it. Let us be well persuaded that we have no greater enemy than ourselves. Only we can harm ourselves and no one else” (Champagnat 1997, 53).

Finally, the third episode is dated 1836 when Father Jean-Claude Colin was elected Superior General of the Society of Mary, a branch of the Marist Fathers of which Marcellin was a member. The following year, 1837, some Marist Fathers believed that Marcellin Champagnat should resign as Superior of the Little Brothers of Mary because of his failing health. In a gesture of total detachment and in obedience to the Superior General of the Society of Mary, Marcellin Champagnat wrote in his letter of resignation:

Mary, my tender mother. I place the branch of the Little Brothers of Mary, which was confided to me in 1816, purely and simply into the hands of Father Superior General of the Society of Mary. I beg you, oh Mother of Mercy, to pardon me of all the faults which I may have committed, neglected, or failed to fulfil in regard to my obligations to this work. . . . (Coste and Lessard 1960, 952)

Although his resignation was not accepted by Father Jean-Claude Colin, the fact that merits attention is Marcellin Champagnat's significant and revealing gesture of presenting his resignation to the Superior General of the Society of Mary, addressing himself first to Mary, his tender and Good Mother (Ribeiro 1989). Marcellin's act of resignation is divided into two parts: in the first, he informs Mary of the transfer of the branch of the Little Brothers of Mary, which had been confided to him in 1816, into the hands of the Superior General of the Society of Mary. In the second part, he addresses himself to Father Jean-Claude Colin and his Council (Ribeiro 1989, 58).

The resignation letter reveals some fundamental elements of the presence of Mary in Marcellin Champagnat's life. Clearly, the certainty of the origin and the call to establish the Little Brothers of Mary was evident, as was Marcellin's loyalty to the promise made to Mary in Fourvière in 1816, in which the twelve newly ordained young men, among them Jean-Claude Colin, Courveille, Terrailon, and Declás, set themselves to work for the glory of God and the honour of Mary (Coste and Lessard 1960, 219–23).

All this reveals the importance of Mary in Marcellin Champagnat's life and the incorporation of Mary in the foundation of the Institute. This feature was so strong that it remains to this day one of the supporting pillars⁵ of the Institute of the Marist Brothers, guiding all its actions in the field of mission, spirituality and its innovative institutional projects.

2.6.4 The First Places: The Crib, the Cross and the Altar

The spirituality of the 17th and 18th centuries assumes strong connotations in the praxis of Marcellin Champagnat. The life of Jesus takes on a central relevance in his spirituality. Salvation was understood as closeness to Christ. However, to be close to Jesus and to undertake a journey of following Him consisted of fidelity and participation in his sacraments, which were ultimately the signs of His presence in the midst of the people of God and of His Kingdom.

Thus, taking Marcellin Champagnat's context into account, one can see a breakthrough in his understanding of spiritual realities and their relationship to life. Marcellin Champagnat was marked by an excess of diligence regarding the sacraments

⁵ The Spirituality bequeathed to us by Marcellin Champagnat is Marial and apostolic. It flows from God's love for us, gains strength as we give ourselves to others, and leads us to the Father (Institute of the Marist Brothers 2011, 20).

and the exercises of piety. However, he managed to employ all the energy generated by the radicalism of his faith and of his disciples towards the project of creating a group of lay religious, whose mission will be to educate and evangelise children and young people, especially those most in need.

Participation in the sacraments can be interpreted in two ways: being close to the rites, signs and symbols of the Catholic religion and the life of Jesus himself, and participation with a view to nourishing an interiority and a practice reflecting faith incarnated in actions. Regarding the first aspect, Marcellin Champagnat invoked the aphorism of the practice of the “presence of God”, repeating it countless times to the Brothers. On the second topic, Marcellin reminded his Brothers that the preferred places of the Marist should be at “the Crib, the Cross and the Altar”, places of the presence of God and of the recipients of the mission par excellence (Furet 1914, 70–4).

Marcellin Champagnat was convinced that following and being faithful to Jesus would become a concrete reality. That is why he asked the Marist Brothers to assiduously frequent the Crib, the Cross and the Altar, and to take the children and young people with them. For through these three places, the Marist Brothers would be incorporating the mysteries of Jesus’ birth and mission, his redemptive death and resurrection into their lives. In the same way, closeness to Mary would be guaranteed, because the mother of Jesus was actively present with her Son in His redemptive mission. As Marcellin told his Brothers, “without Mary we are nothing, and with Mary we have everything, because Mary always has her divine Son either in her arms or in her heart” (Champagnat in Brambila and Clisby 2007, 45).

Therefore, the means by which Marcellin Champagnat interpreted the reality of his time and tried to respond to its challenges included being present with Jesus and Mary through the sacraments, personal prayer, devotion, and exercises of piety. Marcellin Champagnat’s interpretation of faith, as well as his practice, was deepened over time, allowing for the necessary adaptations and reinterpretations of new contexts. This dynamic aspect guarantees that living the Marist charism and exercising the mission remains relevant to the demands of an incarnate evangelisation and attentive to the reality of today’s world.

2.7 MARCELLIN CHAMPAGNAT'S LEADERSHIP IN A CHANGING WORLD AND CHURCH

At the beginning of the 19th century, France was shaken by the different social movements that had culminated in the French Revolution. All the institutional structures were radically affected by these events. A new government structure, based on a post-revolutionary paradigm, was starting to take shape. The population suffered the impacts of these changes in a similar fashion. Although what was being preached was the ideal of equality for all, what was actually perceived was widespread desolation, leading many families into complete misery (Zind 1988, 169–73).

In the field of education, France did not yet have a national public system for early childhood and youth education. Far from the larger urban centres, the situation was even more dire, with very low-quality educational provision for children and young people (Farrell 1984, 13). Marcellin Champagnat became aware of this reality and felt called to respond. According to Lanfrey (2017, 251), the first school founded by Marcellin Champagnat in La Valla was not his “only objective; he aimed at the whole parish territory”.

With the state's abandonment of communities in the rural countryside, it fell to religious institutions to ensure the education of children and young people. Families did not have the economic capacity to finance sending children to schools in large centres, nor could they afford to pay the high cost of the few quality schools that still existed locally.

The revolution succeeded in destabilising the bases of Catholic strength in the country, however, it did not devise a new system of ideals and meaning for the people (Zind 1987a, 123). Once again, the Catholic Church presented itself as a protagonist in the construction of a new social horizon, primarily because it already had a doctrine and a solidified spirituality. Moreover, a large group of religious figures, with few financial and material resources, took on the mission of resuming Catholic hegemony on French territory (Lanfrey 2017, 69–77).

It is precisely within this horizon that Marcellin Champagnat exercised his foundational leadership. In parallel with various other religious figures and congregations, Marcellin Champagnat was able to interpret and establish his project in order to respond to the needs of the time. In Marcellin Champagnat's case, this response

manifested itself through the founding of the Institute, which was more linked to his dynamism, charism and leadership, than to the innovation of ideas or educational systems.

With regard to the educational dimension, Marcellin Champagnat was inspired by the system of the de La Salle Brothers (Brothers of the Christian Schools), recognised as an original, renewing and totalising system. With the De La Salle Brothers, France saw the emergence of a new type of education which used a systematic, structured system of teaching of subjects deemed specific to each grade and which featured proper formation for educators (Zind 1988, 12–4).

Marcellin Champagnat studied the method of the de La Salle Brothers and incorporated several of its elements into Marist pedagogy, further enhancing it by introducing sporting and recreational practices and a new form of literacy and reading (Furet 1989, 162; Sester 2003, 66; Silveira 1994, 238). Moreover, for local government authorities who invited the Marist Brothers to found schools, Marcellin Champagnat insisted that school premises should include places for sports and recreation. Aware that the de La Salle Brothers' schools were confined to the larger urban centres, Marcellin Champagnat focused his action on the rural communities and those with less financial resources. In his letter to King Louis-Philippe, Marcellin Champagnat makes the purpose of his foundation very clear:

born in the canton of Saint Genest Malifaux, Department of the Loire, learning to read for me was fraught with countless difficulties and for lack of competent teachers. From then on, I felt the urgent need for an institution which could, at much less cost, replicate in the countryside what the Brothers of the Christian Schools do in the towns. (Champagnat 1997, 91)

Added to this was the idea of adapting costs without sacrificing the quality of teaching. To this end, schools were only established with the necessary number of Brothers for each specific context. Moreover, within this scope, Brothers from several different schools were provided with a joint formation through attending holiday courses at a common centre (Furet 1989, 422). These configurations greatly reduced the schools' implementation costs while ensuring their quality, contributing to the great success and rapid fame of the Marist schools. As a result, invitations to open more schools multiplied, extending beyond the capacity of the Marist Brothers to fulfil these requests (Lanfrey 2013, 136; 2017, 440).

Regarding the evangelising aspect of his mission, Marcellin Champagnat understood schools as important places for religious and catechetical formation. As such,

it was necessary to have well-formed Christian educators, committed to the human and Christian development of their students. Clearly, Marcellin Champagnat, inspired by his solid confidence in Mary, and strong in his own charism, undertook an educational project where human and spiritual development went hand in hand.

Self-awareness also was a key part of Marcellin's leadership and was helpful in his future relationships with the many brothers in the Institute that he helped form. He showed a genuine and deep affection for his “Little Brothers of Mary” evident especially in the many of his letters to the Brothers—“My dear brother. . . My dear friend. . . My dear son. . .”. Thus, the Brothers saw Marcellin’s love and concern for them in all their struggles—because he too struggled in his life and so helped them to understand their struggles (Consigli 2009, 22).

2.8 CONCLUSION

The expansion and success of the Marist charism and mission around the world is mainly due to Marcellin Champagnat’s sensitivity to his social and ecclesial context, his critical reading of the thoughts and spirituality of the time, and his conviction on topics linked to the education and evangelisation of children and young people, especially those in vulnerable situations. For Marcellin Champagnat, “to educate children well, one must love them and love them all equally” (Furet 1989, 538).

This reveals the importance of Marcellin Champagnat’s charism and leadership in dealing with the challenges of the time from a Gospel perspective. Marcellin Champagnat believed that to ensure a high-quality evangelising education for children and young people, it was essential to have leaders who were committed to Marist principles and leaders who are well prepared for the transformation of the world. Marcellin Champagnat’s foundational intuition renders his charism current and present in the most varied contexts of the contemporary Marist presence. In the face of the challenges and adversities of the contemporary world and of the Church, and in order to continue fulfilling an educational-evangelising mission for children and young people, it is the Institute’s duty to guarantee the vitality and continuity of the Marist charism through its leaders.

CHAPTER THREE

MARIST CHARISM: A GIFT TO BE CARED FOR

3.1 INTRODUCTION

The Marist charism represents an important wealth for the Church, and indeed for the world. Throughout the history of the Institute, the Marist charism has inspired and guided people—men and women, consecrated and lay, children and young people—to live their Christian faith and has fuelled their commitment to build a world based on the values of the Gospel (The International Marist Education Commission, 2007). Ensuring the vitality and perpetuity of the charism means guaranteeing the continuity of the Marist mission, which seeks to make Jesus Christ known and loved among children and young people (Furet 1989, 331). As John Lydon (2009, 8) stated “. . .the disciple should also experience the charism of the leader as lived vitality”. In a real way, the Institute contributes significantly to realising the Church’s mission in the world, as inspired by the charism and leadership of Marcellin Champagnat.

This chapter proposes a theoretical approach to the nature of the charism, and in addition, explores how the charism emerges in religious institutes in the Church. It also proposes an interpretation of the Marist charism and its main characteristics, highlighting its origin in Marcellin Champagnat and its continued existence to the present day thanks to the contribution of various generations of Brothers and Lay Marists. Finally, the chapter presents ways to transmit the charism, keeping in mind its vitality and continuity, the importance of the co-responsibility of the laity, and the crucial role global Marist leaders play in its transmission.

3.2 THE NATURE OF THE CHARISM

The word “charism” evokes a wide variety of interpretations and understandings. According to Gomes Filho (2014, 121), even without considering the word used to name it, the nature of charism, the substance that provides it, the element that makes a human being differentiated from others to the point of persuading them to go against what is considered the norm, remain obscure in the face of some of the theories. In this sense, Lindholm states:

But what was the meaning of it all? Was the word—charism—just a way of categorising and trying to capture a completely inexplicable experience? Some scholars said that this was in fact what happened, that is, that charism is in fact a meaningless term, completely useless to analyse. Unfortunately, they have not replaced it, leaving us only with the events devoid of a word to describe them. The question is whether it would be possible to discover a theoretical structure in the discourse on charism that would help us make sense of what seems meaningless. (1993, 17)

While much research has been conducted in order to understand “charism”, a more precise definition of it is still lacking—one that takes into account the phenomena that inspire or influence leadership, as well as the actions and behaviour of people, groups or institutions. The fact that the nature, substance and even origin of the word charism have yet to be properly defined causes many scholars to be challenged in their attempts to theorise this element which differentiates certain human beings in society (Gomes Filho 2014, 121).

Nevertheless, according to Gomes Filho (2014, 121–2), in the 18th and 19th centuries, authors such as David Hume, Stuart Mill and Friedrich Nietzsche highlighted the distinct character of men driven by passion, who generated new directions for history, created conflicts, revolutionised traditions and broke with naturally-accepted practices. According to Gomes Filho (2014, 121–2), at the beginning of the 20th century, Max Weber (1864-1920) dealt with questions surrounding these people marked out as special by viewing them as charismatic leaders.

Therefore, in order to understand the question of the charism in the Church, it is fundamental to consider how the Second Vatican Council approached the topic, for it leads to the understanding that the Church is not a closed reality without reference to the world. On the contrary, the Church is a reality incarnated within the world and in the reality of the lives of pilgrims seeking the full meaning of life (Borges Neto 2006, 292).

In this regard, the conciliar document *Gaudium et Spes* states:

the joys and the hopes, the griefs and the anxieties of the men of this age, especially those who are poor or in any way afflicted, these are the joys and hopes, the griefs and anxieties of the followers of Christ. . . . United in Christ, they are led by the Holy Spirit in their journey to the Kingdom of their Father and they have welcomed the news of salvation which is meant for every man. That is why this community realises that it is truly linked with mankind and its history by the deepest of bonds. (Pope Paul VI 1965c, n. 1)

Human reality becomes the reality of the disciples of Christ, moving them towards a strong human spirit of solidarity. For this reason, the gifts and charisms bestowed on Christians by the Holy Spirit must be placed at the service of all. This highlights not only

the free initiative of the Holy Spirit, but also His personality, since it is He who distributes charisms to each as He wills (Borges Neto 2006, 292–3).

In the Second Vatican Council, the term charism finds its place in the ecclesiology of communion for theological reflection. Thus, the statement of the document *Lumen Gentium* on charism becomes important:

it is not only through the sacraments and the ministries of the Church that the Holy Spirit sanctifies and leads the people of God and enriches it with virtues, but “allotting his gifts to everyone according as He wills” (1 Cor 12:11). He distributes special graces among the faithful of every rank”. . . . These charisms, whether they be the more outstanding or the more simple and widely diffused, are to be received with thanksgiving and consolation for they are perfectly suited to and useful for the needs of the Church. (Pope Paul VI 1964, n. 12)

In this way, the Holy Spirit opens the Church to communion and charisms, encouraging a flexible mindset to accept diversity and meet the needs of the Church and humanity. According to Lydon (2011, 75), the word “charism” stems from the Greek *χάρισμα* (tr. charism), literally translated as “gift”. For Michael Green (2018, 24), “it is not a word that has been found elsewhere in the Greek literature of his (St. Paul) time, and one theory is that it was a colloquial term for gift, generous gift, or gracious gift”. Along these same lines, McFarland *et al.* (2011, 94) explained:

the term is prominent in the letters of Paul, where it is used principally to designate particular abilities (e.g., prophecy, exhortation, compassion, leadership, teaching, healing, glossolalia) given to individuals for the benefit of the whole Church (Rom 12:6–8; 1 Cor 12:4–10, 28–31; cf. 1 Pet. 4:10). It can also function more generally to designate gifts bestowed by God on the community as a whole. (Rom 6:23; 11:29; 1 Cor 1:7)

A charism, therefore, can be interpreted as a gift given to the Church by the Holy Spirit, so that it can act in the midst of the people and in harmony with the Gospel. In this way, the will of God can be harmonised with the sensibility and will of humans. The source of the charism always springs from some aspect of the life of Jesus, expressed in the Gospel, which is inexhaustible in time. Even more, it occurs under the seal of the Church, seeing as it is through the sacraments that Christ communicates his holy and sanctifying Spirit to the members of his body (Catechismo della Chiesa Cattolica 1992, 739, 205). Just as Jesus came to proclaim the Kingdom to the people, the charism is also presented as a gift of the Spirit to humanity, and so the charism emerges within the Church, but must break through in order to manifest and consolidate itself in the everyday lives of the people.

For this reason, the charism is recognised as a gift, as the meaning of the Greek word suggests, but it is also a service. As Paul says in his letter to the community at Corinth, although there are a variety of gifts, they must, however, work together for the benefit of the community (1 Cor 12:4–7). In this sense, Lydon (2011, 43) defines the word charism as “the realisation in practice of grace, a gift which enables the believer to contribute to the common good”. The Holy Scriptures speak of how God is present in the lives of his people, hears their cries, takes pity on their problems and intervenes to help them (Ex 3:7–8, Jn 1:14). Thus, charisms represent an ever-renewed continuation of Jesus’ own mission to humanity.

For Michael Green, St Paul’s understanding of charism is clearly important in an ecclesial context, but not in a functional sense. For Paul, charism is “God’s way of giving life, fullness and efficacy to God’s life in the Church”, and these gifts are complementary and give “full expression of the life in the Body of Christ, with people with their diverse giftedness living as members of this Body” (2018, 25).

As such, a charism is a specific gift of the Holy Spirit, linked to a singular need illuminated by the work of Jesus in the world. It becomes a reality when the human heart recognises and receives this gift, externalises it through performing a particular mission in the world, and then sensitising other attentive hearts towards sharing this interior impulse. Therefore, the charism is received and expanded geographically and temporally through generations of people who share this gift. The diversity of charisms makes the Church whole and complete in its work of witnessing Jesus Christ and rescuing human beings (1 Cor 12:4–31). Therefore, for Lydon “. . . indeed service and work are part of the inclusive nature of charism, abilities to shape actions for the good of the community” (2009, 4).

Finally, history demonstrates that charisms always manifest themselves in human realities and contexts which reveal their vulnerability, provoking discomfort and demanding detachment on the part of Church; there is no escaping or denying it because it is the Holy Spirit who challenges and impels the Church towards new horizons, broadening its evangelising reach, helping to see Christ present in the realities of humanity and providing the strength to go out to meet Him.

For Rambaldi (1975):

the Holy Spirit, from whom comes the power and the will to do good, intervenes to make Christians capable and willing to carry out the apostolate required by their situation and the community to which they belong, and distributes to them his particular gifts so that

they may be good dispensers of the manifold grace of God for the edification of the whole body in charity. Such gifts are, precisely, the charisms. (1975, 151)

Therefore, the definitions of Max Weber, Vatican II and St. Paul are fundamental to understanding the charism. However, it is the perspective of St. Paul that is particularly fundamental to the understanding of the Marist charism. In the Pauline epistles, especially in the Letter to the Romans, the term *Χάρις* (tr. Charis meaning ‘grace’) appears 24 times (Cranfield 1977, 71). In St. Paul’s view, charisms are of a divine nature, different from human talents, for they are manifestations of the Holy Spirit: “all these are the work of one and the same Spirit, and he distributes them to each one, just as he determines” (1 Cor 12:11).

In Chapter 12 of his first letter to the Corinthians, St. Paul emphasises three important words when referring to charisma. The first describes charisma as “gifts” (charisma)—“now there are varieties of gifts, but the same Spirit” (1 Cor 12:4); the second deals with the dimension of “service” (diakonia)—“and there are varieties of service, but the same Lord” (1 Cor 12:5); and, finally, the third speaks of “work” (ergemata)—“and there are varieties of workings, but the same God is working all things in everyone” (1 Cor 12:6). According to Silva (2009), in this formulation of the apostle, one can infer that he seeks to highlight that the gifts of grace (charisma) are intended for service (diakonia) and that all powerfully manifest the divine action or operation (ergemata).

For Lydon (2009, 43), Paul is therefore implying that the gift is not synonymous with grace, but rather the result of it. A charism is the practical realisation of grace, a gift that enables the believer to contribute to the common good. Therefore, for Paul, charisms include “in the church first of all apostles, second prophets, third teachers, then miracles, then gifts of healing, of helping, of guidance, and of different kinds of tongues” (1 Cor 12:27–8). Although there is a variety of gifts, they should all, however, be at the service of the whole community.

Therefore, according to Lydon (2009, 44), by connecting gifts and Spirit and acknowledging their interrelationship with service and work, Paul is firstly reiterating the point that since all gifts have a common origin; they should serve a common purpose. Secondly, Paul is affirming that the purpose of charism is the promotion of solidarity among believers, for the Spirit is the principle of community (koinonia), reflected in Paul’s final greeting to the people of Corinth, namely, “and the fellowship (koinonia) of the Holy Spirit be with you all” (2 Cor 13:14). Third, in connecting charisma and ‘work’

(*energumata*), Paul implies the concept of power, since the word ‘work’ is used in other contexts to represent an active power or principle (see Rom 7: 5; 1 Thes 2:12). The purpose of such power is to coordinate the gifts of the community for the common good.

Thus, one can note three important features in the understanding of “charism”. The first is that charisms are gifts of God’s grace, and therefore, a manifestation of the Holy Spirit in the life and mission of the Church; second, these gifts are given in view of the personal good, but above all, the common good; and third, since they are gifts of the Holy Spirit, it means that the life of the Spirit is a life in faith, it is a concrete and real experience. It is from this perspective that the charisms of religious Institutes can be understood, and especially the Marist charism, which was received from Marcellin Champagnat and passed on from generation to generation in the most varied contexts and cultures around the world.

3.3 THE CHARISM AND ITS CENTRALITY FOR CONSECRATED RELIGIOUS INSTITUTES

Charism is one of the central elements of institutes of religious life. It gives them life through the evangelical inspiration offered as a gift to their founders. Similarly, it also sustains them, organises them and promotes them throughout the course of history, making them ever-present even today. Lydon, reflecting on the work of Max Weber (1864-1920), argues that “. . . particularly significant in the context of the contemporaneous emergence of Religious Orders dedicated to teaching and the significance of the charism of individual founders is its power to inspire followers or disciples” (2009, 6).

The founders’ charism guides the actions of their followers. While the charism maintains the founders’ inspirational core, it does not depend on them for its own existence. On the contrary, the charism detaches itself from its founders and grows, fuelled also by the experiences of the followers. In this way, the charism possesses a dimension of integrity regarding its originality, at the same time as it is exposed to a process of continuous adaptation and change in relation to the needs of contemporary challenges. Hence, the nuanced dynamics of the charism in religious institutions.

According to McFarland *et al.* (2011, 94), “charism can be used in a way that combines these collective and individual meanings, referring to the form of service to the Church characteristic of a particular religious order, as derived from the vocation and

practice of its founder”. As such and as a general rule, the charism remains under the tutelage of an ecclesial religious institution, comprising communities of people who are sensitive to the charism, gathering around it to continue expanding this gift given by the Holy Spirit. Along this line, Pope John Paul II says in his Post-Synodal Apostolic Exhortation *Vita Consecrata*:

the West has also known, down the centuries, a variety of other expressions of religious life, in which countless persons, renouncing the world, have consecrated themselves to God through the public profession of the evangelical counsels in accordance with a specific charism and in a stable form of common life, for the sake of carrying out different forms of apostolic service to the People of God. Thus, there arose the different families of Canons Regular, the Mendicant Orders, the Clerics Regular and in general the Religious Congregations of men and women devoted to apostolic and missionary activity and to the many different works inspired by Christian charity. (1996, n. 9)

However, it is worth mentioning that charisms are not born from one or other particular religious institution. They are, in fact, consequences of the individual experiences of their founders who, by fully opening themselves to the will of God, receive this specific gift. Originally, a charism arises from the experience of a person who is called “founder” or a “founding group”. As Lydon notes (2009, 6), “this notion of inspiring other is central to the reflections of Max Weber on charism”.

This reality is not reduced to any specific group. Rather, as a gift of the Holy Spirit, it cannot be contained or saved, but instead expands to other people, being shared by a community that is in continual and exponential expansion, which is then structured and formalised as part of an institution. Pope John Paul II also speaks about this:

this is a splendid and varied testimony, reflecting the multiplicity of gifts bestowed by God on founders and foundresses who, in openness to the working of the Holy Spirit, successfully interpreted the signs of the times and responded wisely to new needs. Following in their footsteps, many other people have sought by word and deed to embody the Gospel in their own lives, bringing anew to their own times the living presence of Jesus, the Consecrated One par excellence, the One sent by the Father. (1996, n. 9)

For John Paul II, charisms are gifts from the Holy Spirit to the Church, shared through their origin by a founder or foundress, as well as by the religious members who identify themselves with the initial proposal, resulting in a kind of double parallel movement. In this way, the Holy Spirit imbues the charisms with vitality and relevance at each moment in history, while preserving their essence. In this dynamic, the collaboration between God and human beings is recognised, establishing an instance in which both are indispensable for the true realisation of the charism.

3.4 THE MARIST CHARISM: A GIFT OFFERED TO MARCELLIN CHAMPAGNAT AND HISTORICALLY SHARED

A charism is born in the Church as a response to the needs of a given social or ecclesial reality. As seen in Chapter Two, Marcellin Champagnat was born during the French Revolution, which had a series of profound repercussions for the urban and rural poor. The situation for children and young people was particularly alarming, given their precarious living conditions, and this ignited Marcellin's response in founding an order of teaching Brothers. In his inspiring work, *The Contemporary Catholic Teacher—a Reappraisal of the Concept of Teaching as a Vocation in the Catholic Christian Context*, John Lydon highlighted the charism of the Salesians and their founder, Don Bosco (1815-1888). For Lydon, Bosco's idea "was to provide a stable setting for the poor and neglected youth who inhabited the city of Turin and its surrounding areas" (2011, 92).

Marcellin Champagnat interpreted his service as a way of living a particular aspect of the Gospel in the service of needy children and young people, offering these youths the opportunity for social and religious growth, in a manner which integrated both aspects. It is in this context that Marcellin Champagnat founded the Marist Brothers (Furet 1989, 61–3). Likewise, Lydon (2011) noted that Don Bosco believed that contact with young people in the formal structures of the classroom were not enough. According to Lydon, Bosco believed that, "the educator must establish an abiding presence with young people. He must seek to be in touch with young people in all possible situations of the school day and beyond" (2011, 98).

Marcellin Champagnat, like Don Bosco after him, had a profound experience of God that marked his life and the lives of future generations (Furet 1989, 312). For Marcellin Champagnat, this experience can be translated into two main spheres: the first concerns following Jesus in the manner of Mary; and the second is the inspiration Marcellin Champagnat found in Mary for the realisation of the mission, especially in her maternal love for Jesus as the inspiration for educating and evangelising children and young people (The International Marist Education Commission 2007, 73). This praxis—that is, an inner experience that nourishes action—gives rise to the charism of Marcellin Champagnat, the Marist charism.

For the followers of Marcellin Champagnat, the Marist charism is understood as a gift given by the Holy Spirit to Marcellin for the benefit of the whole Church and world.

This gift enriches the ecclesial community and, in a special way, all those influenced by the Marist charism. In this regard, Br. Seán Sammon writes:

the charism that entered our Church and world through Marcellin Champagnat, therefore, is much more than certain works thought to be faithful to his original vision, more than a style of prayer or a particular spirituality—as important as both might be—and more than a composite of the qualities that marked our founder’s life. Our Institute’s charism is nothing less than the presence of the Holy Spirit. (2006, 27)

According to Sammon (2006, 42), “allowing that Spirit to work in and through us can give rise to some surprising outcomes. . . . Today the Spirit that was so active in our founder longs to live and breathe in you and me”. In this sense, the Institute, through its community of Brothers and Lay Marists, receives a specific mission regarding children and young people from Marcellin Champagnat (Institute of the Marist Brothers 2007, 114).

The Marist document *Water from the Rock* (2007) underlines the gift of the Marist charism as an invitation for Brothers and Lay Marists to develop, fully live and deepen it: “we believe the charism of Marcellin Champagnat is a gift given to the Church and to the world, a gift which we are being invited to further develop and live by progressively deepening our participation in this charism” (Institute of the Marist Brothers 2007, 25–6). The same energy and determination can be found in the life of Don Bosco:

Bosco was convinced that tireless zeal and self-giving was one of the principal ways in which Salesians could contribute to the building of the Kingdom. Immediately prior to preparing to send his first missionary expedition to Patagonia he said: ‘Work and temperance will make the Congregation flourish, whereas the seeking of an easy and comfortable life will instead bring about its death’. (Lydon 2011, 102)

Similarly, the Constitutions and Statutes of the Marist Brothers recognise the Marist charism as a gift from the Holy Spirit via Marcellin Champagnat and through which Christians are inspired to follow Jesus Christ as Mary did (Institute of the Marist Brothers 2020a, 16). Both Brothers and laypeople are heirs of the charism of Marcellin Champagnat: “We acknowledge and welcome the many people who are attracted to the Marist charism and who identify themselves as being ‘Marist’. This movement of the Spirit unites all Marists of Champagnat into a global charismatic family” (Institute of the Marist Brothers 2020a, 19).

For this reason, other people, also attentive and sensitive to the calls of God, decided to join Marcellin Champagnat, broadening and enriching the Marist charism. In this way, the foundational experience gained more and more followers, which led to the

need to formalise its organisational structures, reaching other contexts and other initiatives related to the mission beyond the schools, thus giving rise to the Institute.

3.4.1 Fundamental Dimensions of the Marist Charism

Over time, the Marist charism has developed and deepened. At present, three fundamental dimensions of the Marist charism are identified: mission, fraternity and shared life and spirituality (Figure 3). According to the document *Gathered Around the Same Table*, “we consider these three dimensions to be inseparable: spirituality lives in and for the mission; the mission generates and encourages the shared life; the shared life is, in turn, the source of spirituality and mission” (International Editorial Commission 2009, 34). The meaning of each of these dimensions for the Institute is presented below.

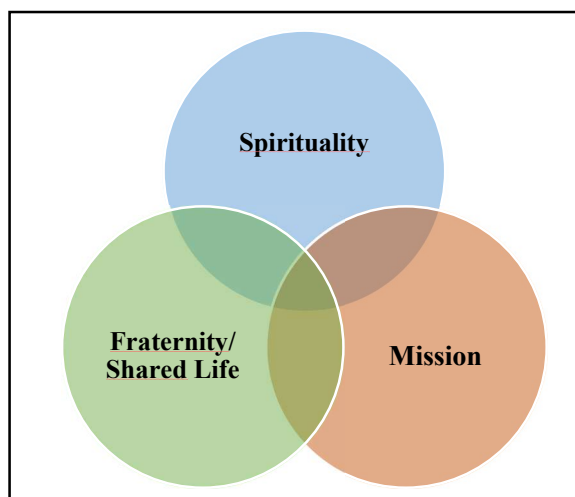


Figure 3. Fundamental dimensions of the Marist charism
Researcher’s Source, 2021.

a. *The mission*

The Marist mission consists of making Jesus Christ known and loved among children and young people through education (Furet 1989, 331). According to Marcellin Champagnat, to educate a child and a young person properly, it is necessary to love them and love them all equally (Furet 1989, 538). According to him, love is the best way “to form good Christians and good citizens” (Furet 1989, 535).

Marcellin Champagnat was clear that the mission of the Institute revolved around children and young people. His personal experience as a child and later as parish priest in

La Valla helped him to be attuned to their reality (The International Marist Education Commission 2007, 33). In such manner, the Institute inspired by Marcellin Champagnat focuses its mission especially on those who are excluded from society, and on those whose material poverty leads them also leads them to be deprived of health, family life, schooling, education, social participation, and spiritual life (International Editorial Commission 2009, 41–2).

In one of the letters that Marcellin Champagnat wrote to Brother Barthélemy, one of the first Marist Brothers, Marcellin Champagnat expresses his great affection and attention for the evangelisation of children and young people:

tell your children that Jesus and Mary love them all very much: those who are well behaved because they are like Jesus, who is the best example of good behaviour; those who are not yet well behaved, it is because they will be. Tell them that Our Lady also loves them, because she is the Mother of all the children in our schools. Also tell them that I love them, that I never go up to the altar without thinking of you and your dear pupils. (Champagnat 1997, 50)

Thus, according to Sammon (2006, 8), the mission is at the heart of the Marist way of life. The identity of the Institute is built around it, just as community life is illuminated by it.

b. Fraternity/Shared Life

According to the *Rule of Life of the Marist Brothers* (2020b), fraternity/shared life expresses the essence of the Marist vocation. Fraternal and shared life is understood as an invitation from the risen Jesus to bear witness to the divinity of the human person (cf. Mt 5:45; 5:40.45) and, therefore, to share life. According to the Rule of Life, which is addressed to the Brothers,

the anointing that you received at the time of your Christian initiation invites you to live out the mystery of your vocation as a partnership fundamental to your identity as a brother, as a prophetic revelation about each person's value, and as a sacrament of the presence of God, the true leaven of universal fraternity. (Institute of the Marist Brothers 2020b, 21)

For the Marists of Champagnat, the table of La Valla is seen as a symbol of fraternity and shared life. It has great symbolic value in the Institute because it is the table around which Marcellin Champagnat and the first Marist Brothers shared life and built fraternity (International Editorial Commission 2009, 17–8). Further, the simple table

of La Valla represents the common call for Brothers and Lay Marists, men and women, to share life and build communion.

As such, the lives of Mary, Marcellin Champagnat and the first Marist Brothers inspire others to live the Marist fraternity (Institute of the Marist Brothers 2020a, 44–5). In his spiritual will, Marcellin Champagnat wrote to the Brothers: “love one another as Jesus Christ has loved you. May there be among you but one heart and one mind” (Institute of the Marist Brothers 2011, 166). This invitation today is extended to all the Marists of Champagnat.

Fraternity/shared life is based on Trinitarian love and recognises the presence of Mary. According to the Constitutions and Statutes:

Trinitarian love is the wellspring of all community life. We respond to the call of Christ by living together as brothers in community. Like the first community at Pentecost, we are conscious of Mary among us. Her presence invites us to live as brothers and reminds us that we form the community of Jesus. Gathered around her, we undertake to build up a Church with a Marian face. (Institute of the Marist Brothers 2020a, 44)

For Marcellin Champagnat, fraternity/shared life should be a witness to Gospel living, love and mutual acceptance overcoming all kinds of differences. In his Spiritual Testament, Marcellin Champagnat asked the Marist Brothers to live the fraternity/shared life: “Dear Brothers, I beg of you with all the love of my heart, and by all the love you bear me, keep ever alive among you the charity of Christ. Love one another as Jesus Christ has loved you (Jn 13:34). Be of one heart and one mind” (Institute of the Marist Brothers 2020b, 124–5). Therefore, the witness of fraternity/shared life is also understood as mission.

c. Spirituality

Spirituality is to be understood as the fruit of Marcellin Champagnat’s deep relationship with Jesus and Mary and his sensitivity to the events of his time. This gift of the Holy Spirit was influenced by his own personality, by the events of his life, and also by the first Marist Brothers who built the fraternity with him. Over the years, this gift has been enriched by generations of men and women who feel called to live the Marist charism (Institute of the Marist Brothers 2007, 25).

In the document *Water from the Rock*, the Institute expresses its spirituality in this way:

we are inspired by the vision and lives of Marcellin and his first disciples as we journey to God. While we share such a pilgrimage with many, we are conscious of our own distinctive style. We are gifted to share in that transforming experience of being, with Mary, loved unconditionally by Jesus. From this flow the particular characteristics of our manner of being followers of Champagnat. (Institute of the Marist Brothers 2007, 26)

Thus, the experience of total surrender to God and to others through living the Marist charism is nourished by the spirituality that involves the reality, fraternal/shared life experience and commitment to the mission (Barba 2020, 17; The International Marist Education Commission 2007, 25). Therefore, spirituality is founded on the presence and communion with God, which becomes more perceptible in the relationship with others. Mary, blessed for listening to the Word and putting it into practice, becomes the model of Marist spirituality. Like Marcellin Champagnat, all people who experience Marist spirituality are called to recognise God's presence and love in the events of life (Institute of the Marist Brothers 2020b, 49; Sammon 2009).

3.4.2 Principal Characteristics of the Marist Charism

The charism of Marcellin Champagnat and the experience of the first Marist Brothers has been moulded into what is today considered the Marist charism. Some features of the Marist charism have been defined and revealed through the generations. At present, the specific characteristics of the Marist charism that are most recognised and disseminated are: presence, simplicity, family spirit, love of work, and following Jesus in the way of Mary (Figure 4).

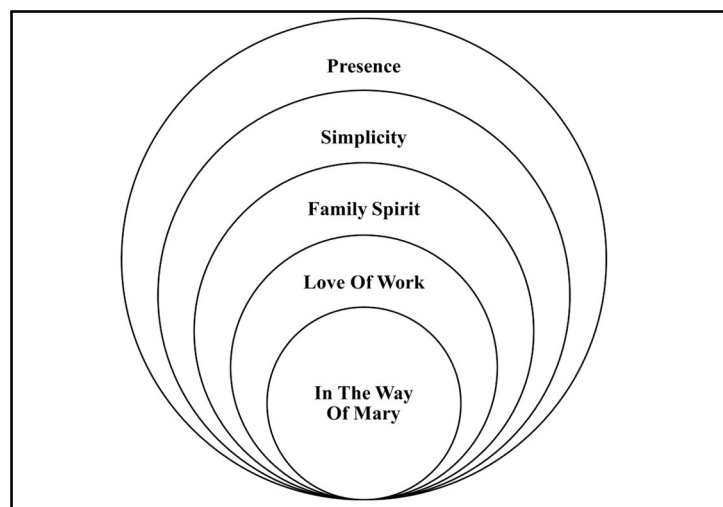


Figure 4. Five core characteristics of the Marist charism
Researcher's Source, 2021.

They are interpreted as the Marist way of enculturating the Gospel. Therefore, it is the sum of these elements and their interactions with each other that give the Marist style its originality inspired by the Spirit (The International Marist Education Commission 2007, 45).

a. Presence

Presence among children and young people demonstrates the Marist interest in each one of them. The Marist's relationships with children and young people are based on love and creating a climate of learning which transmits values, as well as opportunities for personal growth (The International Marist Education Commission 2007, 45). These relationships also provide opportunities to become involved in their lives and welcome them into the Marist family.

Presence takes the form of free time, leisure, sports and cultural activities, contact with nature, family visits or any other means the youths themselves devise. In this way, it is possible to help children and young people through preventive presence and counselling. By respectfully being firm and demanding with them, remaining optimistic and focused on their integral growth (Barba 2020, 87; The International Marist Education Commission 2007, 45–6).

b. Simplicity

Simplicity is expressed primarily through genuine and direct contact with young people, without pretence or duplicity. Such simplicity is the fruit of a unity of mind and heart, of character and action that derives from honesty before self, God and others. Awareness of one's own limitations and potential, contributes to a better understanding of children and young people, while respecting their dignity and freedom. Therefore, the Marist way of educating and evangelising, like that of Marcellin Champagnat, is personal and rooted in real life. Similarly, simplicity guides the Marist way of responding to the possibilities and demands of contemporary educational and evangelising environments (Barba 2020, 41; The International Marist Education Commission 2007, 46).

c. Family spirit

Marcellin Champagnat wished to imbue the Brothers with a strong family spirit. In this sense, the Institute seeks to create a great family spirit founded on Marist values through its Marist initiatives and communities. This is why each person linked to the Marist charism in each of its educational centres and communities should feel welcomed and accepted and feel a sense of belonging to the Marist family. All this independent of their role, social position, race or religion. As in a family, Brothers and Lay Marists share life, with all its successes and failures, with children and young people, setting clear standards of honesty, mutual respect and tolerance (Sammon, 2005; The International Marist Education Commission 2007, 47–8). In a contemporary context, in light of the 22nd General Chapter (Institute of the Marist Brothers 2017), the Marist Institute feels called to form a “global charismatic family”.

d. Love of work

Marcellin Champagnat was a person who derived satisfaction from work. Stubborn effort and complete trust in God were characteristic of the way he educated himself, led the parish in La Valla, founded his religious family and accomplished all his projects. Following Marcellin Champagnat’s example, the Institute tries to instil in children and young people a love of work through the development of a sense of personal planning and motivation, which shows itself in the good use of time, talents and initiatives. To this end, teamwork is encouraged, helping them to acquire a cooperative and socially sensitive approach to the service of others (Farrell 1984, 8; The International Marist Education Commission 2007, 48–9).

e. In the way of Mary

For the Institute, Mary is a companion on the journey and an inspiration in responding to God’s calls and in facing the challenges of the contemporary world. As a woman, laywoman and the first follower of Jesus, Mary inspires the faith and the Marist way of educating children and young people as she educated Jesus Christ. Mary not only knew the joys and trials of life, but she also marvelled at the greatness of God even when she was troubled. In faith, she responded wholeheartedly, not expecting to have answers

to all her questions, but giving her “yes” at the Annunciation and at the foot of the Cross. Like Marcellin Champagnat, Marists are called to look to Mary as the Good Mother and Ordinary Resource and to express their love for her (Sammon, 2009; The International Marist Education Commission 2007, 49–51; Turú, 2012).

Consequently, the Marist charism becomes an example of the renewing power of God’s activity in human history. Marcellin Champagnat received a charism, a unique spiritual gift given through him to the whole Church in its service to humanity. He was inspired by the Holy Spirit to discover a new way of living the Gospel as a concrete response to the spiritual and social needs of the children and young people of his time. Throughout its history, the Marist charism has confirmed its relevance for the Church and the world by inspiring generations of people from around the globe. Ensuring its continuity and vitality is the great challenge facing the Institute today.

To journey in the way of Mary is to find life in God with joy and confidence; to say YES to the mission He entrusts to each baptized person: “I am the Lord’s servant, may your word to me be fulfilled” (Lk 1:38). In this way, the Magnificat (Lk 1:46–55) becomes an invitation to leave one’s comfort zone and to place oneself at the service of others, especially the impoverished who are in the peripheries of the world. Like Mary, Marists are called to be the tender and merciful presence of God among children and young people. For their lives are filled with the presence of God himself (Institute of the Marist Brothers, 2020b).

3.5 TRANSMISSION OF THE CHARISM

Many of the religious Institutes as presented in this chapter received their charism through a founder or foundress. These individuals knew how to read the context of their time and, touched by divine grace, felt called to give answers in all spheres of human life. According to Brother Charles Howard, Superior General of the Institute (1985-1993), charism is related to “a special grace given to the founders and foundresses of religious institutes. . .” (1991, 385).

Among of these congregations, many, such as the Lasallians, Salesians, Jesuits and Marists, have focused their mission on education. Some were founded in the 19th century or earlier, and today several of them face the challenge of continuity and revitalisation of their charism. Some of the reasons for these challenges include the lack of new vocations to religious life; the ageing of their members; the delay in responding

to social and ecclesial changes; the new paradigms of the world and the perspectives of today's children and young people; and the lack of a process of transition of the charism from the world of religious life to the lay world (Green, 2009).

Therefore, while recognising the richness of charisms, the challenge for many religious institutes today is the transmission of this charism. The Marists have received a great gift in the person of Marcellin Champagnat and in his educational intuitions and those of Marist educators since him and they want to be faithful to this heritage in a dynamic way. The cries of children and young people in today's world are no less urgent than they were in Marcellin Champagnat's time and these cries demand "fresh responses" which "tap into Marist roots" and "re-discover the passion and vision for the mission for today's younger generation" (The International Marist Education Commission 2007, 15). In this sense, it becomes important to reflect on the vitality and continuity of the charism, the co-responsibility of the laity, the role of global leaders, and other possible paths to ensure the transmission of the charism.

3.5.1 Vitality and Continuity of the Charism

Since charism is a gift from God to the Church and humanity, it is important that this gift be at the service of the common good. The diversity of charisms contributes to the enrichment of the human community (1 Cor 2: 4–7). In this context, the reading that St. Paul makes in relation to the gift received and Spirit in view of the common good is fundamental. According to Lydon (2009, 44):

in connecting gifts and Spirit, and recognising their interrelation with service and work, Paul is firstly reiterating the point that since all gifts have a common origin, they should serve a common purpose. Secondly, Paul is asserting that the common purpose is the promotion of solidarity among believers since the Spirit is the principle of community (*koinonia*), reflected in Paul's final greeting to the persons of Corinth, namely, 'the fellowship (*koinonia*) of the Holy Spirit be with you'. Thirdly, in connecting charisma and 'work' (*energemata*), Paul implies the concept of power since the word 'work' is used in other contexts to represent an active power or principle (see Rom 7:5; I Thes 2: 12). The purpose of such power is that of coordinating the gifts of the community for the common good.

Since social justice and the promotion of the common good are part of the core mission of all Christians, charisms cannot be restricted to the walls of religious convents. Rather, a charism is a gift for the whole Church. Thus, religious congregations recognise the need to share the charism, to make it alive and dynamic outside the institutional walls as well, so as to continue building the history and lives of many people and communities

(The International Marist Education Commission 2007, 29). For many congregations the challenge is to find the most appropriate ways of transmitting the charism in order to guarantee its vitality and continuity.

3.5.2 Co-responsibility with Laypeople for the Marist Charism

The Second Vatican Council included a greater acknowledgement of the role of laity in the Church and in the world. In addition to their direct contribution in the Council, the laity were mentioned dozens of times in the various conciliar documents. In particular, the encyclical, *Lumen Gentium*, and the conciliar decree *Apostolicam Actuositatem*, brought a new vision to the apostolate of the laity. The Council opened the Church and consequently the religious congregations with their charisms to the lay world.

Today, laypeople play a vital role in the ministry of the Church. In the same way, within religious congregations and in the continuity and vitality of their charisms, it is unthinkable to continue the charism without the faithful commitment of the laity. Accordingly, the Vatican Council stated that:

from the acceptance of these charisms, including those which are more elementary, there arise for each believer the right and duty to use them in the Church and in the world for the good of men and the building up of the Church, in the freedom of the Holy Spirit who “breathes where He wills” (John 3:8). This should be done by the laity in communion with their brothers in Christ, especially with their pastors who must make a judgment about the true nature and proper use of these gifts not to extinguish the Spirit but to test all things and hold for what is good. (cf. 1 Thes 5:12,19,21) (4) (Pope Paul VI 1965b, n. 3)

According to Michael Green (2009), in one of his lectures on “Lay Spirituality and Charisms”, laypeople occupy important places within the Church and many congregations. However, many sectors of the Church and religious orders need to open up to a greater role for the laity and embrace their legitimate leadership and influence. As with Christ with the disciples of Emmaus (Lk 24:13–35), it is necessary to work together to share experiences, vision, understand events and create commitment towards the future of the charism. Similarly, the transmission of the charism to the laity requires a process of accompaniment, discernment and empowerment (Green, 2009).

Religious institutes, especially those working with education and youth, need to move from programmes and theoretical proposals about their charisms to a proposal for full engagement of the laity in all dimensions of the life, spirituality and mission of the shared charism. For many religious institutes, the continuity and vitality of the charism

necessarily passes through a greater preparation, participation and commitment of the laity to the charism (Green 1994, 4).

For Marists, the Constitutions and Statutes of the Institute of the Marist Brothers explain that:

our Marist charism, a gift of the Holy Spirit to the Church and the world, inspires some to want to live their Christian vocation in a Marist way, either as a brother, a sister, a married or single lay person, or as a priest. . . . We are all heirs of the Founder's charism, and so the practice of personal and community discernment and of fraternal dialogue assist us in listening to the voice of God for the good of our community life and mission. (Institute of the Marist Brothers 2020a, 29)

Thereby, it becomes fundamental for the gift of the charism to the whole Church to be recognised, alongside the sharing and co-responsibility of the charism with the laity. As dispensers of this grace, the laity are called to live, witness and transmit the Marist charism, responding to the reality and challenges of their baptismal vocation.

3.5.3 Possible Ways to Transmit the Charism

The ways to transmit the charism of a religious congregation can be both formal and informal (Hilton 1998; Lydon 2009). Formal ways involve the training and accompaniment programmes and processes that an institution offers to its members, as well as the immersion experiences. Informally, it is possible to identify the concrete experiences in the mission, such as the sharing of spirituality, prayers, retreats, participation in different spaces of reflection, planning and decisions. The latter can coexist with the formal processes of transmission of the charism.

Indeed, both formal and informal processes are important for the transmission of the charism. However, to generate effective commitment to the charism, the participation of the laity is fundamental in more vital spaces of the religious institutes, as well as in the vocational and spirituality spheres, and in the joint decision-making and construction of a vision for the future of the charism. The Institute, for example, recognises the need to transmit the Marist charism to the “partners in mission” (Institute of the Marist Brothers 1999, 7).

For Mathieson (2000, 55–66), there are some relevant ways that can contribute to the transmission of the charism. Among these paths, Mathieson highlights four main transmission methods, directed especially to lay leaders: personal commitment to the charism; articulation of the charism with the religious institution; sharing leadership and

decision-making and support to professional development programmes. All these integrated paths favour a greater understanding, identification and commitment to the charism and its future.

3.5.4 The Crucial Role of the Marist Global Leaders in the Transmission of the Charism

Contemporary leaders, and especially lay leaders, acquire a fundamental role in the transmission of the charism. This becomes more relevant in a context in which many congregations are seeing the number of their religious members diminish and age. The current generation of laypeople still have the opportunity to make their way together with their religious counterparts. However, for future generations in many places, the living witnesses of the charism will be the Lay Marists themselves. Hence, the importance of preparing lay leaders not only to lead the mission of religious institutions, but also regarding their commitment and co-responsibility as pertains all the aspects and dimensions of the charism.

For consecrated men and women, the experience of community life makes for an organic way of transmitting the charism. Sharing meals, prayers, community dialogue and being a part of a common project of community life can help in transmitting the charism in a dynamic, balanced and familiar way. For Mathieson, “whilst it may have arisen as much by necessity as more laypeople take on responsibility for schools established initially by a religious order, it also reflects the growing interest from laypeople to share in the mission of the order” (2000, 17). Lydon (2009, 46), based on Jay A. Conger (1989), considers “the process of building up a community of commitment as the creating of a special emotional bond between the leader and the group of followers, resonating with Jesus’ call to his first disciples ‘to be with him’ (Mk 3: 14)”.

In addition, Hilton (1998) recognises that a charism only has life when assumed by the people. For Green (1997, 99), the future of the charism belongs to the laity. As a condition, they must be fully involved in the charism. In this context, leaders have a fundamental role in the revitalisation and ongoing perennial nature of the charism. Therefore, Marist global leaders have a particular commitment to ensuring the vitality and continuity of the charism. This commitment passes through the formation of leaders at all levels of the Institute so that they can know and commit themselves to the Marist charism in all its dimensions.

3.6 CONCLUSION

The topics presented in this chapter are fundamental issues for present and future generations of Marists, since they involve not only the creative fidelity of the Marist charism, but serve also as its backbone, without which the charism existence cannot be imagined. Faced with the challenge of the vitality and perpetuity of the Marist charism, the participants of the 21st General Chapter felt “impelled by God to go out into a new land, to facilitate the birth of a new epoch for the Marist charism” (Little Brothers of Mary 2009, 17).

Ultimately, the present generations of Marists are responsible for recreating the foundational experience of Marcellin Champagnat and the charism’s original core, experiencing the call to follow Jesus Christ in the way of Mary, educating children and young people, especially those in vulnerable situations. It is, above all, fundamental that laypeople and Marist Brothers, through the support of a prophetic and collaborative leadership, have knowledge and an authentic and profound experience of the charism. In this way, it will be possible to imagine with greater confidence the vitality and continuity of the charism and the Institute.

CHAPTER FOUR

CONCEPTS AND FORMATION OF PROPHETIC AND COLLABORATIVE GLOBAL LEADERSHIP

4.1 INTRODUCTION

This chapter presents theoretical references regarding the concepts and formation of prophetic and collaborative global leaders, although it does not endeavour to address all available theories. The chapter is organised into five sections that present the main definitions from the global, Church and Marist contexts. In the first section, the vision for leadership in the current context is described, while the second section presents an understanding of global leadership. The third section deals with the main concepts of prophetic leadership and the fourth with collaborative leadership. Finally, the fifth section introduces some important elements for the formation of global leaders.

4.2 SITUATING LEADERSHIP IN THE CURRENT CONTEXT

In a global context that is increasingly interconnected by technology, current challenges and impasses have a significant impact on civil and religious institutions, highlighting the need for the latter to be able to transform and adapt to the present. Failing to respond to this reality can compromise any institution's future horizons within society or within the Church. In his Apostolic Exhortation, *Evangelii Gaudium*, Pope Francis states that:

in our time humanity is experiencing a turning-point in its history, as we can see from the advances being made in so many fields. We can only praise the steps being taken to improve people's welfare in areas such as health care, education and communications. At the same time, we have to remember that the majority of our contemporaries are barely living from day to day, with dire consequences. (2013, n. 52)

This context gives rise to a series of imperatives that organisations must create and continuously develop, the most significant among them is leadership. According to Avery (2004, 6), "today's organisations operate in a rapidly changing context, which is compounding complexity and uncertainty at all levels of society". Organisations of a civil, community and religious nature face significant challenges in preparing their

leaders to respond to humanity's contemporary context. Therefore, a proper grasp of what constitutes leadership in the contemporary world is crucial.

For Avery (2004), "leadership issues such as charisma, leadership as heroic action, the nature of managerial work, organisational equilibrium versus conflict, how to lead through meaning and symbolism, manipulating the truth, and follower participation can be found in Plato's discourse" (Avery 2004, 3). Additionally, the idea of developing leadership skills also dates back to ancient times:

McCullough's extensive research into ancient Rome, Greece and Troy reveals that many leaders were destined by birth for leadership and were prepared for this role through their education and experience. Preparing the Pharaohs for leadership was also given considerable thought and attention, while the famous Greek philosopher, Aristotle, was entrusted with the education of Alexander the Great, the future leader of an empire. (Avery 2004, 3)

There is no one universal definition of leadership. Some researchers refer to leadership as management, a reference to the past, present or future; to dealing with change or managing stability; to a personality or symbol; to processes of influencing people, among others (Avery 2004, 3). Similarly, according to Pearce and Conger (in Fletcher and Katrin 2003, XI), "Leadership has historically been conceived around an individual and his or her relationship to subordinates or followers". In this sense, concepts of leadership have basically focused on the behaviours, mentalities and actions of a leader within a given organisation or team, which have ended up dominating the thinking in the field of organisational behaviour.

Recently, some scholars have challenged traditional notions of leadership by seeing it more along the lines of shared responsibility for members of groups or organisations. The paradigms that have influenced this view of leadership allow one to understand the differences in behaviours, beliefs, power, processes and applications of leadership. These paradigms are based on different underlying assumptions, which make them flexible enough to adapt to different circumstances, reflecting many of the ways in which leadership can be understood by different groups of people in a social context (Avery 2004, 20).

In Table 1, Leadership Paradigms, the details of the main paradigms representing the four major sets of ideas about leadership—classical, transactional, visionary and organic leadership can be seen:

Leadership Characteristic	Classical	Transactional	Visionary	Organic
Major era	Antiquity-1970s	1970s-mid-1980s	Mid-1980s-2000s	Beyond 2000
Basis of leadership	Leader dominance through respect and/or power to command and control.	Interpersonal influence over and consideration of followers. Creating appropriate management environments.	Emotion-leader inspires followers.	Mutual sense-making within the group. Leaders may emerge rather than be formally appointed.
Source of follower commitment	Fear or respect of leader. Obtaining rewards or avoiding punishment.	Negotiated rewards, agreements and expectations.	Sharing the vision; leader charisma may be involved; individualised consideration.	Buy in to the group's shared values and processes; self-determination.
Vision	Leader's vision is unnecessary for follower compliance.	Vision is not necessary and may not ever be articulated.	Vision is central. Followers may contribute to leader's vision.	Vision emerges from the group; vision is a strong cultural element.

Table 1. Leadership Paradigms

Source: Avery 2004, 19.

In Avery's view (2004, 7), "an acceptable definition of leadership needs to be sound both in theory and in practice, able to withstand changing times and circumstances, and be comprehensive and integrative rather than atomistic and narrow in focus". For Turano and Cavazotte (2016), it is possible to affirm the existence of essential elements that characterise leadership and where there is consensus, such as the processes of influence, the dynamic interaction between leaders and their followers, the quest to achieve goals or objectives, and the promotion of some degree of transformation in a given social context. These elements contribute to the definition of leadership, taking into account both the theoretical framework and the leader's own context.

With this understanding, following are some definitions of leadership deemed pertinent to this case study:

- For Turano and Cavazotte (2016), "leadership can be defined as an interactive process in which leaders influence their followers to undertake efforts and achieve transformative goals in the contexts in which they operate".

- For Koontz and Wehrich (1988, 437), leadership can be understood “as influence, the art or process of influencing people so that they will strive willingly and enthusiastically towards achievement of group goals”.
- Plunkett (1996) understands leadership as cooperation, the ability to work with and through others while gaining their respect, trust, loyalty and willing cooperation.
- For Davis (1967 in Velayudhan *et al.* 2011, 1), leadership is “the ability to persuade others to seek defined objectives enthusiastically. It is the human factor which binds a group together and motivates it towards goals”.
- Milliman, Czaplewski, and Ferguson (2003) propose spirituality as a leadership theme, especially spirituality at work considering the increased awareness and interest in spirituality in organisations.
- Gutiérrez Blanco (2003, 179) presents an ethical educational leadership, emphasising how mission serves as a promoter of a beneficial transformation.
- Pearce and Conger (in Fletcher and Katrin 2003, 1) define leadership as “a dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organisational goals or both”.
- Burns (1978) and Bennis (1989, 7) argue that transformational leadership is a strategy that “aims to motivate employees to achieve organizational goals”.

In addition to the conceptualisation of leadership and its main characteristics, a leader must bear in mind the necessary skills to efficiently perform the mission entrusted to him/her, as well as facing the challenges inherent to his/her field of action. According to Koontz and Wehrich (1988), these skills are: the ability to use power effectively and responsibly; the ability to understand that human beings are motivated by different forces at different times, in different contexts and in different situations; the ability to inspire followers to apply all their capabilities to a project; the ability to act in a way that develops a conducive climate for responding to and awakening motivation in view of a purpose.

It could be argued that in the current context, there is a more developed and deeper understanding of what it means to be a leader, the elements that characterise it and the skills needed to develop leadership. All this allows institutions and communities to design leadership profiles that meet their interests and contribute to improving their reality.

4.2.1 The Challenges of Leadership in the Realm of the Church and Religious Institutes

Historically, the Church has displayed its leadership by responding to the human and spiritual needs of people across various temporal, geographical, cultural, political and religious contexts. One of the Church's most significant moments in the modern world was the Second Vatican Council, which took place between 1962 and 1965. In this instance, the Church summoned both the ecclesial hierarchy and the faithful across the entire world to respond to contemporary demands, while preserving the principles and essence of the teachings of the Church's tradition (Pope John XXIII 1962).

Gaudium et Spes (Pope Paul VI 1965c), the Pastoral Constitution on the Church in the Modern World, refers to joy and hope as movements of life and for life, which must emerge from a relationship with Jesus Christ. Therefore, in the face of the challenges and limitations of humanity brought about by the modern age and intensified by post-modernity, ecclesial leaders are challenged to place hope in overcoming problems as an imperative of loyalty to Jesus and, consequently, share in the happiness of this union with those within the Church and with all of humanity.

Another important point about leadership in the ecclesial context concerns the elemental attitude of love and commitment to all peoples, as a sign of commitment to Christ himself, as presented in *Lumen Gentium*, the Dogmatic Constitution on the Church. This text puts forward the attitude of being prophetic—that is, of solidarity, of walking together with the people, sharing their pain and joy, but also pointing out possible paths. According to *Lumen Gentium* (Pope Paul VI 1964, n. 30), this commitment belonging to all the faithful derives from the prophetic mission of Christ.

In the Apostolic Exhortation *Evangelii Nuntiandi* (1975), Pope Paul VI presents the profile of leaders needed for this new moment of the Church. These evangelisers should not be “dejected, discouraged, impatient or anxious”, but rather form those “whose lives glow with fervour, who have first received the joy of Christ, and who are willing to risk their lives so that the kingdom may be proclaimed, and the Church established in the midst of the world” (Paul VI 1975, n. 80).

As delineated in the Council documents, the mission of the Church is to assist every human being in attaining the full abundance of life in both its material and spiritual dimensions (Pope Paul VI 1965a). In this way, the most important mission of a Church

leader is to foster structures and processes that guarantee an abundant life for all humanity.

In *Evangelii Gaudium* (2013), Pope Francis calls Christian leaders to the missionary proclamation of the Gospel, source of Christian joy, and to put efforts into promoting peace, social justice, strengthening the family unit, caring for the environment, ecumenism and interreligious dialogue, and promoting a greater role for women in the Church. In his encyclical letter, *Fratelli Tutti* (Pope Francis 2020b), Pope Francis presents fraternity and social friendship as paths that Christian leaders should follow for building and transforming a world based on social justice and peace.

Therefore, the Church reinforces the mission of Christian leaders to commit themselves to a message where Christian values and practices are plausible and necessary for the contemporary world, offering a life of meaning and direction. In this same vein and as explored in Chapter Three, leaders of religious institutes should commit themselves to the promotion of a Christian humanism that is in keeping with the Church's guidelines, and as motivated by their charism and mission. For this, Christian leaders must be inspired by Jesus himself, who is an inexhaustible source of the Church's mission, and by the organisations and institutions born from a charismatic call, such as the Institute.

4.2.2 Some Aspects of Leadership from the Perspective of the Institute of the Marist Brothers

According to Furet (1989, 519–34), Marcellin Champagnat did not hesitate to seek the best means possible to ensure the education and evangelisation of children and young people. Consequently, Marcellin Champagnat serves as a fundamental leadership reference, particularly regarding strategic aspects, a vision for the future and operational issues. The strength and potential of Marcellin Champagnat's experience, his sensitivity to the social and ecclesial needs of his time and his vigorous adherence to the calls of the Gospel continue to inspire men and women even today.

In the Marist tradition, there are many sources of inspiration for leadership. Among them, the practice of the little virtues (indulgence, charitably pretending not to notice, compassion, holy joy, gentleness of spirit, charitable concern, affability, urbanity and politeness, condescendence, devotion to the common good, patience and balance of soul and character) (Furet 1914, 311–8). In addition, for Marcellin Champagnat, the work

of a Marist leader must be well prepared by study, nurtured by prayer, supported by good example, and methodical and accessible to children and young people (Furet 1914, 376–85).

According to Turú (2012), today's leaders have the great challenge of remaining attentive to the cries of the people, especially the voices of the most vulnerable. For this, they must be inspired by Mary who, guided by the Holy Spirit, knew how to discern and respond to the calls of God and the needs of humanity:

those who govern us let themselves be guided by the spirit of the Handmaid of the Lord. Like her, they listen, ponder, and act (Constitutions, 120). This is the Marian leadership we all share, a leadership from below, not with readymade answers, but with attentive listening, with the humble attitude of Mary, who knows how to let herself be challenged by God and by others. (2012, 53)

The Church, religious institutions and any other institutions based on Christian values, have the great challenge of preparing leaders that are committed to their mission and to Christian principles in the diverse contexts of their presence and for the benefit of all humanity. Considering the growing presence of many of these institutions around the world, the formation of prophetic and collaborative global leaders can contribute to the greater dynamism and vitality of their mission.

4.3 UNDERSTANDING GLOBAL LEADERSHIP

The understanding of global leadership is significant in the context of this case study which has as its research object the General Council. This Council has responsibility for the leadership, management and governance of the Institute of the Marist Brothers globally. In exercising a leadership role for the whole Institute, the General Council carries the responsibility of promoting life and mission and of ensuring the vitality and future of the Marist charism.

A deeper reflection on global leadership must be ongoing, and it is particularly associated with the effects of globalisation the world has undergone in recent decades. Global leadership is a phenomenon that began in the 1990s with the globalization of the world economy. In this same vein, Ducker (2012, 1 in Hassanzadeh *et al.* 2015, 16) states that “global leadership is a relatively new concept, a fact that is testified by the lack of an established definition, a paucity of field research and limited methodological sophistication”.

Considering, therefore, the novelty of this phenomenon, many theorists have sought to understand and define global leadership to better support the leaders, organisations, companies and groups that have become more interconnected, active and that have an impact directly or indirectly around the world. On this issue, Conger and O'Neill (2012, 53 in Hassanzadeh *et al.* 2015, 17) observe that global leadership "refers to an organisation's leadership talent who work across geographic and cultural boundaries". Cohen (2010, 3) complements this idea, affirming that global leadership signifies "a leader who will not only have to be generally effective in traditional skills expected but also with additional knowledge, skills and above all mindset to navigate through the complexities brought on by moving beyond traditional borders".

The concept of global leadership integrates anyone who leads global change efforts in the public, private or non-profit sectors (Osland 2008, 34). As such, global leadership encompasses individuals who effect significant positive change in organisations by developing trust and arranging organisational structures and processes in a context involving multiple stakeholders and sources of authority and multiple cultures, under conditions of temporal, geographical and cultural complexity (Mendenhall *et al.* 2008, 17). For other scholars, the distinction of global leadership lies in its ability to influence the thinking, attitudes and behaviours of a global community to work collaboratively towards a common vision and goal (Adler 1997, 174; Osland and Bird 2005, 123). Therefore, the global leader is able to operate effectively in the global environment while respecting cultural diversity (Harris *et al.* 2004, 25).

In this sense, to promote the understanding of global leadership, it is necessary to distinguish a global leader from a domestic leader. For Adler (1997, 175), one of the distinguishing elements is that, unlike domestic leaders, global leaders address people all over the world by being concerned with the interaction of people and ideas across cultures, rather than with leadership effectiveness within the home country. Thus, an important characteristic of global leadership is that it focuses on this interaction between cultures, rather than on a single culture or a comparison between various countries. Another characteristic is that leaders articulate a vision that is in itself global in nature (Adler 1997, 175–6).

In addition to the challenges in conceptualising the terminology "global leader", there is also no full consensus on the scope or implications of global leadership. In order to create greater clarity for the definition and boundaries of the global leader designation, Reiche *et al.* (2013, 24), as well as Osland (in Schmitz and Zhang 2020, 19), present three

critical dimensions that address the contextual, relational and spatial-temporal elements of global leadership: complexity (the contextual dimension), flow (the relational dimension) and presence (the spatial-temporal dimension). According to these authors, these dimensions represent the conditions under which global leadership emerges.

a. Complexity—the contextual dimension

According to Reiche *et al.* (2013, 24) and Osland (in Schmitz and Zhang 2020, 20), the first dimension refers to the complexity of global activities determined by the environment in which global leaders live and operate. Although different, these environments share four common conditions: multiplicity, interdependence, ambiguity and flux.

- Multiplicity: “refers to the variability of competitors, customers, governments, and stakeholders that global leaders have to confront in their work roles”.
- Interdependence: “reflects the rapid, worldwide movement and interconnectedness of capital, information, and people”.
- Ambiguity: arises from the enormous amounts of information and technological data that generate uncertainty due to the data’s inherent lack of clarity, imprecision of meaning and unreliability; the non-linearity of the relationships; and the possibility of error due to multiple interpretations of the same facts.
- Flux: “a situation in which everything is in constant change. Flux is both a result of, and a nonlinear catalyst of complexity”. (Reiche *et al.* 2013, 24–5)

b. Flow—the relational dimension

Another important aspect that differentiates a global leader from a domestic leader is that the former must cross a variety of boundaries, both inside and outside the organisation. These boundaries may be related to cultural, linguistic, religious, educational, political and legal systems, among others. Hence, there is the need to create links that allow essential knowledge and information to flow across them (Reiche *et al.* 2013, 25; Osland in Schmitz and Zhang 2020, 20–1).

c. Presence—the spatial-temporal dimension

The third dimension is that of presence. According to Reiche *et al.* (2013, 25), Presence “reflects the spatial-temporal dimension, and indicates the degree to which an

individual is required to physically move across geographical, cultural, and national boundaries, and not just communicate across them via virtual technologies”.

The content of leadership in a global environment is another important element to consider. In the view of Reiche *et al.* (2013, 26), global leadership can be conceived as both a state and a process. This is because a global leader exercises a clear process of social influence; is committed to a shared vision with his followers; and makes efforts to proactively aid in the development of his followers, as well as contribute to collective growth. For the authors' perspective (2013, 26), leadership is not a value-neutral process, as it has the potential both to harm and to edify those involved. Therefore, talent development becomes fundamental as a crucial aspect of leadership in which institutions can assess their leaders beyond the results of their standard performance.

The global world exponentially expands possibilities and imposes new models of work and leadership. As seen previously, a global leader must deal not only with multiple geographies, but also navigate cultural, social, economic and religious barriers, as well as deadline expectations, communication rhythms, different values and behaviours and worldviews. As a result, Schmitz and Zhang (2020) present four main challenges that global leaders confront today: managing global complexity, leadership effectiveness, guiding change and managing internal stakeholders.

1. **Managing global complexity:** “Today’s global complexity, with its interdependence and ambiguity, requires an intricate process of collaboration, discovery, architecture and system thinking”.
2. **Leadership effectiveness:** This is the biggest challenge for organisations today, regardless of where they are in the world. There will always be leadership effectiveness challenges related to managerial issues, inspiring and motivating others, communication, leading teams, etc.
3. **Guiding change:** A global leader must manage, inspire, mobilise, understand and lead their team, know how to mitigate consequences and overcome resistance in a continuous fashion.
4. **Managing internal stakeholders:** A global leader, in addition to managing his or her team, must also be aware of other internal stakeholders, managing these relationships as well as the accompanying political and image perceptions and seeking their support (Schmitz and Zhang 2020, 12–4).

The components of leadership presented in this section provide a comprehensive understanding of what it means to be a global leader acting and impacting across borders and a domestic leader acting within a country's borders. At the same time, it allows one to outline some key characteristics and skills for the performance of such leaders' work, considering their role and context. It should be noted that the global leader is a figure that emerges strongly within the new complexities of today's world.

4.4 PROPHETIC LEADERSHIP

Being prophetic, in the biblical sense, is not a profession but a vocation. In this context, a prophet is one chosen and sent by God to preach. An example of this is the prophet Amos, who, when answering the priest Amazias, said, "I was neither a prophet nor the son of a prophet, but I was a shepherd, and I also took care of sycamore-fig trees. But the Lord took me from tending the flock and said to me, 'Go, prophesy to my people of Israel'" (Am 7:14–5).

According to Costa (2015, 165), in the Bible the word "prophet" is usually used to designate someone who occupied a specific religious position in ancient Israel. Costa (2015) states the term derives from the Greek *prophētēs*, composed of two Greek words: the preposition *pro* meaning "by" or "beforehand" and the verb *phēmi* meaning "to speak" or "to proclaim". Accordingly, the word prophet can represent both "speaking for" or "in place of", and "speaking beforehand" or "foretelling" (Costa 2015, 165). Thus, a prophet is one recognised by the community or group who speaks on behalf of God. Corroborating this idea, Reimer (2008, 813) states that "prophets spoke before the community as messengers of God".

In addition, for McFarland *et al.* (2011, 413), prophecy is in the name of God. In the book of Deuteronomy (5:27), the people of Israel make the following request of Moses: "Go near, you yourself, and hear all that the Lord our God will say. Then tell us everything that the Lord our God tells you, and we will listen and do it". This passage reveals that Moses' approach, more than geographical, is implicitly moral and spiritual in order that he may know the will of God. With this, Moses can convey God's will to the people of Israel so that they can discover God's will for themselves (McFarland *et al.* 2011, 413).

Ordinarily, the prophet is a person stripped of material riches and consequently someone who experiences freedom. As the biblical book of the prophet Amos reveals, he

was not silent before reality. He denounced a religiosity of appearances and the economic and social prosperity that benefitted a part of the population to the detriment of the poor majority. Amos therefore denounces social injustice, as well as the idolatry of his people.

Lumen Gentium (Pope Paul VI 1964, n. 35) presents Christ as the great prophet who, by the testimony of his life and the power of his word, was able to proclaim the kingdom of God, thus fulfilling his prophetic mission. Like Christ, all Christians are called to bear prophetic witness to the society which they live. Laypeople, like their pastors and those who follow the vocation of religious life, are also called to give witness to their prophetic leadership in the Church and in society: “consequently, even when preoccupied with temporal cares, the laity can and must perform a work of great value for the evangelisation of the world” (Pope Paul VI 1964, n. 35).

Therefore, according to De Oliveira (2020), the Church is called to bear witness to Christ, taking bold and prophetic positions in the face of the various forms of corruption and social injustice:

Prophetic witness requires a constant and passionate search for the will of God, a generous and indispensable ecclesial communion, the exercise of spiritual discernment and love for the truth. This witness is also expressed through the denunciation of what is contrary to the divine will and the search for new ways for the Gospel to act in history, in the perspective of the Kingdom of God. (De Oliveira, 2020)

In the contemporary world, other leaders, such as Mahatma Gandhi (India, 1869-1948), Bishop Oscar Romero (El Salvador, 1917-1980), Sister Dulce (Brazil, 1914-1992), Mother Teresa of Calcutta (India, 1910-1997), Bishop Hélder Câmara (Brazil 1909-1999) and Pedro Casaldáliga (Spain, 1928-2020), among others, are known for being prophetic. They were not afraid to take the side of the voiceless and marginalised and fight for their rights to justice and dignity. Following the example of these prophets, Christian leaders must also denounce everything that harms the dignity and freedom of the human person, created in the image and likeness of God, as well as everything that threatens life on the planet, the work of God’s hands (De Oliveira, 2020).

According to Turú (2022 in Institute of the Marist Brothers 2022, 154), as important as the cultivation of prophetic foresight or intuition is the ability to share it and communicate it appropriately to others. For Turú, the prophetic tradition of the People of God enlightens us on how to exercise this style of leadership, when what it involves is illuminating the future and awakening hope. The 2013 General Conference of the Institute of Marist Brothers, held in Saint Chamond, France, called on Marist leaders to make a

commitment “to awaken the dawn” of a new time and welcome their vocation to be prophets and mystics of this time. Like Mary and nourished by the Gospel, Marists must make their educational and social commitment their way of acting and denouncing the situations of injustice today (Institute of the Marist Brothers, 2013).

Based on this vision of the concept of prophet, Campbell believes that “all prophetic leadership should begin and end with the person of Jesus Christ, the Word of God, to whose life and witness Spirit-inspired prophecy testifies” (Campbell 2015, under Prophetic Leadership). In this way, a prophetic leader can be defined as one who, living and acting inspired by the Word of God, interprets the signs of the times, denounces social injustices, participatively builds a vision of the future based on Gospel values, and mobilises followers to carry it out.

Some characteristics are important in defining the prophetic leader. The first is his or her charism. Therefore, a prophetic leader can be said to be a person of vision and character with an ability to imagine, articulate and influence people to overcome the everyday, to transform and build community and effect lasting change and growth (Avolio and Yammarino 2013, Green 2018; McHugh 1968; Parry *et al.* 2019; Shamir *et al.* 1993, 583). The second is their Christian characteristic, which assumes their leadership as a gift from God, and therefore a vocation, a call to action (Byler, 2014; Geise 2002; Nouwen, 2018); another characteristic is readiness for service (Blanchard and Broadwell, 2018; Greenleaf 2002; Prosser 2001), and a sense of belonging to a community (Parry *et al.* 2019).

Thus, a global leader has the great challenge of building a shared and participative vision, of defining paths and strategies, as well as mobilising people to carry them out in the most varied contexts across the globe. This vision and these horizons are the fruit of an attentive and profound reading of the reality in which one is inserted, in addition to a consonance with global movements and scenarios.

4.5 COLLABORATIVE LEADERSHIP

Collaboration is an important component associated with global and prophetic leadership. In the context of this study, it is important to examine this component critically from both social and theological perspectives.

4.5.1 Collaborative Leadership in the Context of the Society

Collaboration is one of the great ways that leaders exercise their role in the society. According to the Longman Dictionary of Contemporary English (2006), collaboration is “when you work together with another person or group to achieve something”. Therefore, collaboration can be defined as working together in a cooperative manner, mutually supporting people to accomplish a goal.

For effective global leadership, working in collaboration with one’s own team, other leaders, people and groups—both internal and external to the institution—is key to achieving its goals. Faced with challenging scenarios in all areas in today’s world, it is becoming increasingly difficult for institutions and their leaders to carry out their projects alone. Thus, collaboration is the most effective way to ensure the achievement of the institutional mission.

For David Chrislip and Chip Larson (1994), collaboration can be understood as:

a mutually beneficial relationship between two or more parties to achieve common goals by sharing responsibility, authority and accountability for achieving results. It is more than simply sharing knowledge and information (communication) and more than a relationship that helps each party achieve its own goals (cooperation and coordination). The purpose of collaboration is to create a shared vision and joint strategies to address concerns that go beyond the purview of any particular party. (1994, 5)

Therefore, collaborative work with other people enables creativity and innovation. This vision of work conceives the institution and its mission as an integrated system, as part of a whole. For Lowe (2011, 314), the ability to see things as integrating systems is one of the underlying components of collaborative leadership. In relation to this, Sorenson *et al.* (2008) perceive business, family, community and society as integrated systems. According to Foldy, Goldman and Ospina (2008), “collaborative leaders tend to inspire action and creativity. . .”.

Collaborative leadership, therefore, is less centred on the individual and more on others and does not enter into the dynamics of competition. In Bass’ view, “there is a correlation between competitive and collaborative approaches and corresponding job performance, satisfaction, and company loyalty” (1990). In a competitive environment, for example, where leadership is centred on the individual, there are losses for everyone, whereas in a collaborative environment, teamwork is valued, and everyone benefits.

It is the influence of leadership that motivates people, groups and institutions towards a common purpose. For example, Chrislip and Larson (1994) define

collaborative leadership as “an ability to articulate a vision and inspire subordinates to share and enact that vision”. Lowe, deepening his thinking and valuing the dimension of leader commitment, defines it as “a way of approaching life and leading others” (2011, 322). Based on these definitions, some characteristics of collaborative leadership can be delineated.

The first characteristic of the collaborative leader is his/her ability to guide and facilitate people, groups and processes. The collaborative leader is committed to people, so he or she creatively seeks ways to inspire and guide them (Lowe 2011, 319). The second characteristic refers to those groups who work collaboratively, which tend to promote each other as leaders rather than concentrate decision making on a single leader (2011, 322).

Ardoin *et al.* (2015) present two other characteristics. For these authors, collaborative leaders are committed to promoting the followers’ learning at the same time as they learn with them (2015, 371–2). The fifth characteristic is knowing how to handle conflict through collaborative problem solving. According to Blake and Mouton (apud Bass), “they [leaders] deal with conflict by integrating conflicting ideas through collaborative problem solving” (1990, 303).

For collaborative leadership, power is not in the person of the leader, but in the community itself. Therefore, the success of the collaborative approach relies on knowledgeable, capable, creative, bold and free followers who recognise that power derives from the community or group itself (Berkes 2004; Freire 1987; Ospina and El Hadidy 2011). In this sense, the work of collaborative leaders basically focuses on harmonising discourse, making a difference and channelling human energies towards the goals entrusted to them (Ospina and Foldy 2010).

Collaborative leadership brings several benefits to groups, communities and institutions, both civil and ecclesial. By adopting a more collaborative model, teams are more engaged and motivated by projects, vision and institutional values. As a result, people feel more valued, close to and committed to a given project, and this brings new perspectives to individuals.

From the perspective of Lowe (2011, 319–20), a considerable benefit for the institution or group which adopts a more collaborative style of leadership, is a greater possibility for change and transformation, since power is decentralised. This allows a more cooperative and horizontal style of work and decision making that favours greater engagement of the people involved in a particular objective. This style of leadership and

decision-making is in line with the trend in various global organisations that seek to make decisions based on participatory development, management and planning policies (Gallardo and Stein 2007; Konisky and Beierle 2001).

With the ideas of Fletcher and Käufer (2003), it is possible to say that the model of collaborative leadership, in relation to other models, is less hierarchical, more egalitarian and provides mutual participation. Similarly, Ardoin *et al.* (2015, 362) state that collaborative leadership focuses on joint problem solving, shared decision-making and open processes of participation. Therefore, this leadership model is based on co-responsibility, that is—a shared responsibility for the mission, people and the institution itself with its principles and values. Everyone is involved, including the leader and his or her followers.

4.5.2 COLLABORATIVE LEADERSHIP IN THE CHRISTIAN AND MARIST TRADITION

In the Christian and Marist tradition, there are four fundamental dimensions involved in collaborative leadership: collaboration as a participation in God's Mission; collaboration as co-responsibility in the mission of the Church; collaboration following the example of Mary; and collaboration as communion and co-responsibility of Brothers and laypeople in Marist life and mission.

4.5.2.1 Collaboration as Participation in God's Mission

In the Christian tradition, collaborative leadership is understood as participation in God's mission, in Latin, *Missio Dei* (Van Aarde, 2016, 284). It touches all dimensions of the life and mission of the Church and religious congregations. It is important to recognise that mission, prior to being considered a task of the Church, is God's. Therefore, if mission belongs to God, the Church depends on Him for its participation in mission. Recognising that mission comes from God means that it is God who is in charge, inspiring and carrying forward His project of the Kingdom, in accord with the divine plan (Turú 2015, 4). Through the whole of biblical revelation, the principal actor is God: active in creation; in the divine judgements; in the liberation of God's people from Egypt; in the exhortations of the prophets; and in the promise of redemption. Thus, collaborative leadership is understood as a participation in the creative and redemptive work of God (Cortez, 2019).

Jesus himself entrusted the mission of proclaiming the Gospel to his disciples, and accordingly, to the whole Church: “go into all the world and proclaim the gospel to the whole creation” (Mk 16:15). In the Gospel of Matthew, Jesus makes more explicit the elements of the mission which he entrusts to His disciples: “Go therefore and make disciples of all nations, baptising them in the name of the Father and of the Son and of the Holy Spirit, teaching them to observe all that I have commanded you” (Mt. 28:19–20). Consequently, the authority for our participation in the God’s Mission comes from Christ Himself.

The Document from the V General Conference of the Bishops of Latin America and the Caribbean, known as *Aparecida Document* (CELAM, 2007, 360) says: “Life is attained and matures in the measure that it is offered up in order to give life to others. This is certainly what mission means”. Participation in the mission of God, therefore, is translated into a commitment and continual surrender to Him and to place ourselves at the service of others.

4.5.2.2 *Collaboration as Co-Responsibility in the Mission of the Church*

According to Serafim (2016), the Church cannot invent its mission and can have no other mission than the one received from God. The Church is missionary because God is missionary, and it has a mission because God gives one to it. Therefore, if mission is from God, it must be centred on Him and on his sovereign plan, revealed in the Scriptures and especially in the person of His Son, Jesus Christ. In the same vein, Turú (2015, 4) says that:

Mission precedes the Church. Mission belongs to God: in and out of the world through the Spirit; God who, in the person of Jesus, teaches, heals, welcomes, suffers. And it is extended today through men and women whom God invites to share in his mission, through the Church, called to be a servant of God’s mission in the world. That is the reason the Church exists. That is why, when the Church does not come out of herself to evangelise, she becomes self-referential and then gets sick.

The Second Vatican Council’s *Lumen gentium*, the Dogmatic Constitution on the Church, says that “the mystery of the holy Church is manifest in its very foundation. The Lord Jesus set it on its course by preaching the Good News, that is, the coming of the Kingdom of God, which, for centuries, had been promised in the Scriptures” (LG, 5). In the Post-synodal Apostolic Exhortation, *Verbum Domini*, Pope Benedict XVI (2010, n. 90) reaffirms that the mission of the Church consists in the proclamation of the Word of

God for the world. He refers to the Gospel of Mk 16:5, in which Jesus sends out his disciples to announce the Gospel and, in their turn, to make disciples, baptising them and revealing to them his teachings (Mt 28:19–20). Pope Francis writes in the Apostolic Exhortation, *Evangelii Gaudium*:

Evangelisation is the task of the Church. The Church, as the agent of evangelisation, is more than an organic and hierarchical institution; she is first and foremost a people advancing on its pilgrim way towards God. She is certainly a mystery rooted in the Trinity, yet she exists concretely in history as a people of pilgrims and evangelisers, transcending any institutional expression, however necessary. (Pope Francis, 2013, n. 111)

For Serafim (2016), the Church is the instrument which God uses to accomplish His mission of blessing all the peoples of the earth and can never forget this mission because it is part of its very essence, of its existence: “As the Father has sent me, I am sending you” (Jn 20:21). In this same line, Wright (2012, 176) affirms that “It is not that God has a mission for the Church, but that He has a Church for His mission”. In this way of looking at things, collaboration is understood as a co-responsibility of Christians in the mission of the Church for the accomplishment of God’s mission.

For Pope John Paul II, a fundamental element for co-responsibility in the mission of the Church is communion. For him, communion and mission are profoundly interconnected and are the basis of co-responsibility (Pope John Paul II 1988, n. 20). Therefore, looking at the mission of the Church and recognising its different ministries, it is necessary to keep in mind the communion of the People of God and their co-responsibility in the mission.

For Pope Benedict XVI (2010, n. 94), no Christian can be oblivious of his or her responsibility to bear witness to and proclaim the Gospel. So, the Church, inasmuch as it is a mystery of communion, is missionary and all Christians, according to their state in life, are called to contribute to the proclamation of the Good News. The bishops, priests and deacons, as well as religious, have an urgent role in the proclamation of the Word in the most varied contexts and challenges which affect humanity. He insists that the lay faithful, in a special way are called to exercise their prophetic baptismal mission and to bear witness to the Gospel in daily life wherever they may be. For Pope John Paul II (1988, n. 20), “the charisms, the ministries, the different forms of service exercised by the lay faithful exist in communion and on behalf of communion. They are treasures that complement one another for the good of all”.

Therefore, the exercise of collaborative leadership within the perspective of co-responsibility in the mission of the Church brings with it a profound commitment of every Christian to the promotion of communion and the proclamation of the Gospel. This implies a great variety of ministries, charisms and services in the Church independent of its structure and hierarchy. It is based on the baptismal vocation of all Christians.

4.5.2.3 Collaboration as Participation in God's Mission and Co-responsibility in the Mission of the Church Following the Example of Mary

This section presents collaboration as a participation in God's mission and the co-responsibility in the mission of the Church, following the example of Mary, from the perspective of the charism of the Institute of the Marist Brothers. The emphasis is on two elements of collaborative leadership in the manner of Mary. The first refers to the mission of the Institute as it reveals the Marian face of the Church to the world. The second takes as its starting point five images of Mary as a way of understanding the implications of a collaborative leadership, following Mary's example. Within this idea of the participation of the Church in the working out of God's mission, the Marist Brothers' Institute proposes, as part of its co-responsibility in the mission of the Church, to reveal the Marian features of the Church. This mission is assumed jointly by Brothers and Lay Marists in a spirit of communion and co-responsibility.

According to Turú (2015, 32), the expression "the Marian face of the Church", although not used by the first Marists, contains the model of the Church which was in the mind and heart of Marcellin Champagnat and the first Brothers. The phrase began to be used only recently, first by the Jesuit theologian, Hans Urs von Balthasar (Leahy, 1996), and then it inspired or was cited by Pope John Paul II (1988) and Pope Benedict XVI (2005). As Turú (2015, 32) points out, the strong attraction which the Brothers and Lay Marists have for this expression is because it sums up well the Marist mission in the Church today.

In a papal audience with the members of the General Chapters of the Institutes of the Marist Family⁶ in Rome, in 2001, Pope John Paul II spoke about the mission of the Marist Family to build the Marian face of the Church:

⁶ Marist Family: Marist Fathers, Marist Sisters, Marist Missionary Sisters, and Marist Brothers.

It is up to you today to manifest in an original and specific way the presence of Mary in the life of the Church and of mankind, developing for this purpose a Marian attitude, characterised by a joyful disposability to the calls of the Holy Spirit, an unshakeable confidence in the Word of the Lord, a spiritual journey in relation to the different mysteries of the life of Christ and a maternal attention to the needs and the sufferings of men, especially the most simple. (Pope John Paul II, 2001)

In this way, Brothers and Lay Marists are called to look to Mary to help the Church seek the attitudes with which Mary responded to her own mission as a believer and member of the ecclesial community (Turú 2015, 32). The way in which Mary brought up and educated Jesus Christ serves as an inspiration and a challenge for the care of God's flock, and in particular the children and young people who are entrusted to the Brothers and Lay Marists throughout the world for the purpose of education and evangelisation.

During a March 2022 papal audience with the Marist leaders of the various administrative units of the Institute, Pope Francis, invited both Brothers and lay Marists to “look beyond with Mary, in the footsteps of the Lord Jesus in their service of educating and evangelising young people, who are particularly sensitive to and interested in ecology”.

Five images of Mary are fundamental for the understanding of Marist leadership in the modern world: Mary at the Annunciation, Mary at the Visitation, Mary at the wedding feast at Cana, Mary at the foot of the cross, and Mary at Pentecost. All of these express the commitment and the attitude which must guide Christian and Marist leaders in our world today.

At the Annunciation (Lk 1:26–38), Mary is sensitive to the will of God and to the divine plan of love for her personally and for the whole of humanity. Though she is troubled at the presence of the angel, she seeks some clarity about the event: “How will this be. . .?” (Lk 1:34). In the image of the Annunciation, Christian and Marist leaders encounter the origin and source of their mission. At the Visitation (Lk 1:39–45), Mary teaches that the mission which God confides to humanity to go in haste to be at the service of others. We are to be at the side of people, whom the Lord calls us to serve, and to sing with them the hymn of liberation (Lk 1:46–56).

According to Labadie (2020), Mary, at the wedding feast at Cana (Jn 2:1–12), recognised the needs of the people and interceded with Jesus for them, letting him know that the wine was finished and trusting him to take care of the needs of the people (Jn 2:3). In the same way, Christian and Marist leaders present the needs of the people of God to the Church and together seek the best way of serving them.

Mary at the foot of the cross (Jn 19:25–7) aligns her response to the plan of God to the very end. She remains faithful, compassionate, comforting, trusting in God’s plan and then allows herself to be accompanied by others. With the Apostles at Pentecost (Acts 2:1–47), Mary is a discreet and familial presence who welcomes, guides, and encourages the mission of the nascent Church. According to Labadie (2020), “Mary helps us to envision the Church as communion: women and men, lay and ordained, co-workers in the vineyard of the Lord”. The sense of communion and co-responsibility in mission which the Holy Spirit inspires at Pentecost, strengthens, and widens the significance of the Christian community which is in the process of being formed.

Pope Francis, speaking on the meaning of community and communion, said that we sense the challenge of finding and sharing a ‘mystique’ of living together, of mingling and encounter, of embracing and supporting one another, of stepping into this flood tide which, while chaotic, can become a genuine experience of fraternity, a caravan of solidarity, a sacred pilgrimage (Pope Francis 2013, 87). Therefore, Mary is an inspiration and a companion on the way for all those people who are passionate about Christ and his Gospel and who feel committed to construct communion and to nurture life.

4.5.2.4 Collaboration as Communion and Co-responsibility of Brothers and Laypeople for Marist Life and Mission

In the context of the contemporary Church, especially after the Second Vatican Council, there is a particular focus on the lay faithful, recognising them as co-responsible for the life and mission of the Church. Therefore, they are part of its collaborative leadership. In the Post-synodal Apostolic Exhortation *Christifideles Laici*, Pope John Paul II writes:

The newness of the Christian life is the foundation and title for equality among all the baptised in Christ, for all the members of the People of God: “As members they share a common dignity from their rebirth in Christ, they have the same filial grace and the same vocation to perfection. They possess in common one salvation, one hope and one undivided charity” (Lumen Gentium, 32). Because of the one dignity flowing from Baptism, each member of the lay faithful, together with ordained ministers and religious men and women, shares a responsibility for the Church’s mission. (1988b, n. 15)

In the Marist context, the reflection on the communion and co-responsibility of Brothers and Lay Marists for the life and mission and for the future of the Marist charism has been accentuated in the last decades. In the *Constitutions and Statutes* of the Marist

Brothers, the Brothers are invited to build communion, provide accompaniment, share spirituality and community life, participate in joint formation and solidarity works with Lay Marists, and promote co-responsibility for Marist life and mission (Institute of the Marist Brothers 2020a, 19).

Thus, collaboration as a way of living life and influencing people towards a purpose and accomplishing the mission in the way of Mary constitutes an essential dimension of global leadership. Collaboration favours the construction of a shared vision, objectives and strategies, in order to be able to realise the mission and purposes of an institution and communities. Together with the prophetic dimension, collaboration complements the leadership profile necessary for the leadership of organisations and institutions with global action.

4.6 LEADERSHIP FORMATION

Leadership formation is necessary and is part of preparing people to exercise a leadership position. The key to success lies in knowing how to properly lead teams to achieve the mission of a group, community or institution. Therefore, it is important to ensure the proper development of aspects of management, decision-making, leadership of people and planning to achieve goals, especially in a global context. Global leaders, therefore, need to seek knowledge, propose continuous and systematic formation for the development of their leadership and the mission they are carrying out. Similarly, their organisations should be committed to providing them with this accompaniment and formation.

For Schmitz and Zhang (2020), “leadership development is the active process of cultivating the necessary traits, skills, confidence and practical knowledge in individuals wishing to pursue leadership positions. It generally applies to the skills an individual needs to manage teams effectively” (2020, 24). In this way, leadership formation aims to expand the mental model of leaders so that they can develop their leadership potential.

For Avolio (2005, 2):

the mental model that each of us builds defines who we are, who we believe we can become downstream, and what we fear and avoid trying to change. Inevitably, unless we can expand this model to enlarge the boundaries of what we view as constituting our possible selves, all of the training, feedback, or personal coaching in the world is likely to fall short of achieving its objectives of developing a person’s full leadership potential.

Day (2014) suggest that when it comes to leadership development it is very important to make a distinction between “leader development” and “leadership development”. For him, leader development focuses on the development of individual leaders, while leadership development focuses on a development process that involves multiple individuals, and this may refer to a group or a team (in Day *et al.* 2014, 64).

Schmitz and Zhang (2020) further state that “leader development is a complementary facet of leadership development. Close in name, different in application. Leadership development focuses on the external management of teams. Leader development *focuses on the internal and personal development of the individual leader*” (Schmitz and Zhang 2020, 25 – authors’ emphasis).

In addition, Day *et al.* (2014, 64) consider that leadership formation should focus on both leadership and the formation process itself, considering that human development involves a complexity of processes that need to be understood. Therefore, it is more than deciding on a type of theory or technique to be used. It is about building a global vision of the leader and leadership in order to understand it in depth and be able to respond to his/her needs. Therefore, leadership formation must consider both the leader’s role and his or her particular situation (Fiedler 1964).

For Avolio (2005, 9), a basic element to keep in mind when developing leadership is knowing “followers” before turning them into leaders. This will contribute to assertive choices and better planning for the development of their potential. A second element is to know the leader as much as possible and with his or her specific talents, strengths, mental model, aspirations, uncertainties, all in the context of his or her actions. This is the place where the leader faces the joys and challenges of his mission and becomes aware of his limits and potential.

Schmitz and Zhang (2020, 25–6) list four benefits of leadership formation: increased productivity, talent retention, improved organizational culture, and increased organisational agility. However, in a global context, leadership presents its own particularities as well as its own challenges. In this regard, global leadership formation programmes need to consider the changeable demands of an organisation that operates globally; the different cultures and realities that the leader needs to deal with; they must determine the need or not for face-to-face contact with teams in all nations of the organisation’s scope; and the cultivation of the skills and competencies to deal with this reality (Schmitz and Zhang 2020, 27).

Leadership formation programmes, therefore, are a great strategy for developing leaders, as they provide opportunities for the development of new skills and more effective leadership performance. Leadership formation programmes involve leaders, followers, dynamic contexts, time, resources, technology, history, as well as other complex phenomena, models and processes, and it is possible to integrate all these different elements into a whole, once their essential components have been identified (Avolio 2005, 4).

To ensure the formation of global leaders, Schmitz and Zhang (2020, 27–8), recognise it is important to make use of three types of strategies: internal training programmes, external leadership development programmes and mentorship. However, there are some challenges to the development of leadership formation programmes, and it is crucial to recognise them, at the risk of insisting on proposals that do not meet a specific context's needs. Schmitz and Zhang (2020, 30–4) note the main challenges are: generic programme content; programmes that are not scalable; too much reflection with no application; ignoring the impact of the institution culture; and no tracking of the real-life results.

Therefore, it could be said that leadership formation is a key factor in developing prophetic and collaborative global leaders. An institution cannot put its future at risk by relying only on the experiences of its leaders. By ensuring quality leadership formation that is conducted in a procedural, continuous, intentional and innovative manner for its leaders, an institution will essentially be investing in its future.

4.7 CONCLUSION

A proper grasp of prophetic and collaborative global leadership and its formation is indispensable for institutions and organisations of any nature that act on a global scale. The complexity of the contemporary world, the growing interdependence among countries, nations, cultures and the challenges in all aspects of human life place great responsibility on global leaders. Therefore, it is of significant relevance to prepare global leaders, who are prophetic—that is, who identify with and are committed to act in this type of situation, and who are collaborative—that is, who through cooperative and co-responsible initiatives that are part of broader networks can influence people to build new institutional perspectives of social impact.

Global leadership formation, in this sense, has a relevant role because it must necessarily follow the double path of incorporating foundational and historical values of the institution, as well as new values and paradigms in today's world. In addition, this formation must guarantee the necessary basis for a leader's personal development, as well as his or her leadership skills. This combination, perceptible in the characteristics dealt with in this chapter, will be of great importance for the future of global institutions and organisations.

Consequently, the concepts presented here, combined with the contents of Chapters Two and Three, are indispensable and serve as the foundation for the purpose of this case study. By exploring the essential elements that participants from the General Council and leaders of Administrative Units around the world have deemed necessary for the formation of prophetic and collaborative global leaders, it is hoped to contribute to the vitality and continuity of the charism of the Institute. This will be explored in the following chapters.

CHAPTER FIVE

METHODOLOGY

5.1 INTRODUCTION

The methodological approach of this study aims to address the research question, that is the identification of the essential elements for the Institute of the Marist Brothers to be able to form prophetic and collaborative global leaders who contribute to the vitality and continuity of the Marist charism. A firm grasp of the interplay between collected data and its convergences with the project's theoretical framework are essential to achieving this research project's general and specific aims. These aims include collecting, analysing and interpreting qualitative and quantitative data pertaining to the mission of the global leaders of the Institute—and in particular the General Council—to guarantee the attraction and formation of prophetic and collaborative leaders, that is, Brothers and Lay Marists. In addition, this study seeks to identify the current strengths and challenges involved in forming leaders for Marist life and mission, in response to the calls of the XXII General Chapter.

By connecting the combined results and findings of the theoretical framework and the collected data, the study aims to determine how global Marist leaders are contributing to furthering the charism at the core of the Institute. On the basis of these findings, the Institute may conduct a deeper analysis into the issue, enabling further reflection which can in turn inform policymaking and the designing of formation programmes that prepare leaders committed to the vitality and continuity of the Marist charism.

5.2 CASE STUDY

This research project's chosen design is the case study, which uses a mixed method approach, allowing for the use of various methods of data collection and data analysis, both quantitative and qualitative, and for different points of view about the object of study. The selection of this methodology was fundamental because it enabled me as the researcher to accompany the Institute's global Marist leaders in real time and within the actual scope of their activities. It also enabled the researcher to glean a deeper

knowledge of the Institute, facilitating the improved exploration, relationship-building and analysis of collected data through interviews and questionnaires.

Case study research is a common method in the academic world and across the different areas of human knowledge. According to Yin (2014, 4), this type of research “. . . is used in many situations, to contribute to our knowledge of individual, group, organizational, political, and related phenomena”.

As a qualitative method, the case study research will contribute to the deepening of the formation of prophetic and collaborative Marist leaders for the continuity and vitality of the charism. It will also assist the researcher in better understanding the true dimensions of his chosen object of study, which was previously beyond the scope of his understanding. In this sense, Creswell (2013, 97) defines case study research as:

. . . a qualitative approach in which the investigator explores a real-life, contemporary bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information (eg. Observations, interviews, audio-visual material, and documents and reports), and reports a case description and case themes.

Case study methodology favours a better understanding of individual, organisational and social phenomena. Through case study, researchers can investigate a given phenomenon in its natural habitat, in its real-world context, in order “to focus on a ‘case’ and retain a holistic and real-world perspective” (Yin 2014, 4). This method brings together various information sources, with the interview being one of the most important.

Yin (2014, 16) defines case study research as an “. . . empirical inquiry that investigates a contemporary phenomenon (the “case”) in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident”. However, considering that it is not always possible to maintain sufficient clarity on phenomenon and context in real world situations, other methodological elements must also be considered. As such, for Yin (2014, 117), case study works in specific contexts where there are many more variables of interest rather than data elements. Other sources of evidence are necessary so that the findings of the investigation can benefit from the prior development of theoretical propositions, which in turn guide the data collection and data analysis. In this study, the use of questionnaires of a quantitative nature were also important in furthering the understanding of the phenomenon under analysis.

Through case study, this research hopes to broaden the general understanding of the formation of Marist leaders. Rather than focusing on what makes this case different, or on comparing it to other cases, the goal is instead to get to know it on a deeper level, to penetrate its essence and capture its singularity in order to properly understand how the entailing behaviours impact on the vitality and continuity of the Marist charism.

For Stake (1995, 8), it is precisely the role of the case study to promote a deepened understanding of a given case, while maintaining an awareness of the fact that it differentiates itself from the others.

The real business of case study is particularisation, not generalisation. We take a particular case and come to know it well, not primarily as to how it is different from others but what it is, what it does. There is emphasis on uniqueness, and that implies knowledge of others that the case is different from, but the first emphasis is on understanding the case itself.

This research engages in exploratory case study. As I did not necessarily have at my disposal all the information from the Institute needed to conduct this study, this methodology was chosen to assist in identifying the essential elements for the formation of Marist leaders. In addition, the continuity of the charism at the core of the Institute depends on the attainment of a deeper understanding of the current context of the formation of Marist leaders.

5.3 RESEARCH

Any research consists of a series of procedures and processes, which aim to develop new knowledge in a given area. Research contributes to obtaining answers to different phenomena and facts of personal and collective interest pertaining to the most diverse human and natural realities. A research is scientific because it follows scientific procedures in order to understand these phenomena or events producing new knowledge of social interest.

According to Cohen *et al.* (2007, 47), the meaning of the term “research” can vary and be legitimately applied in different contexts from art to collective interests, such as urban traffic, among many others. For the purposes of this research, Stenhouse’s concept (1970) was applied, which defines research as “a disposition to examine one’s own practice critically and systematically”. This concept is corroborated by Cohen and collaborators (2007, 47) by referring to the concept of social research as something which

“restricts its usages to those activities and undertakings aimed at developing a science of behaviour, the word science itself implying both normative and interpretive perspectives”.

Research can be quantitative or qualitative in nature and each involves a different approach. For Creswell (2014, 97), “research approaches are plans and the procedures for research that span the steps from broad assumptions to detailed methods of data collection, analysis, and interpretation”. When starting a research project, it is fundamental for the investigator to define the most efficient type of approach for his specific study. This depends fundamentally on the problem which is the object of investigation or on the aims that have been defined.

The overall decision involves which approach should be used to study a topic. Informing this decision should be the philosophical assumptions the researcher brings to the study; procedures of inquiry (called research designs); and specific research methods of data collection, analysis, and interpretation. The selection of a research approach is also based on the nature of the research problem or issue being addressed, the researchers’ personal experiences, and the audiences for the study (Creswell 2014, 97).

5.3.1 Research of an Empirical Nature

The research on the formation of Marist leaders for the vitality and continuity of the Marist charism is of an empirical nature. In order to conduct the investigation, a qualitative case study method of research was used, and a secondary quantitative approach was applied for some of the investigated elements.

Field research, supported by interviews and questionnaires, made it possible to find the evidence necessary to understand a given case. For this process, it is necessary to define in advance the questions that will be asked, the phenomenon that will be studied and to describe the process used for the study. Basic data collected for this study was the result of the direct experience of the reality of the Institute and through the support of fieldwork participants.

Empirical research is based on the researcher’s direct observation and mediation of phenomena. According to Gaskell (2000, 349), this type of research “derives from the application of observation and experience to a research question rather than being grounded in theory alone”. In this sense, theories and hypotheses must contrast with the data collected. The findings of the research are based on real, concrete experience of the

phenomenon that is the object of the study. Therefore, “the process of empirical research encourages subjects to reflect on their role within a given situation” (Gaskell 2000, 350).

5.3.2 Research of a Descriptive Nature

The study is also of a descriptive nature, which made it possible to better understand the data collected through fieldwork, as well as to promote a global vision of the Institute with an emphasis on its recent history, and more specifically with the marker of the Second Vatican Council. Elements of the Institute’s religious, spiritual, charismatic, educational and evangelising traditions and of its activities in the world of childhood and youth assist in promoting a better understanding of the concepts and practices that are currently at the heart of the Institute. In addition, a deeper understanding of the contemporary literature regarding leadership, charisma and the formation of leaders was extremely important. Part of this literature involves documents and guiding principles pertaining to the Christian tradition which the Institute follows. Finally, the study explores other theological, philosophical and sociological sources related to the phenomena that is the object of study.

This exercise has helped to understand how the concepts and traditions that have been incorporated by contemporary Marist leaders are expressed and translated. The objective of this critical rescue, as explained by Lydon (2011, 24):

... is to provide a comprehensive articulation of the conceptual resources and constitutive practices centred on the notion of vocation as a foundation for the subsequent exploration as to whether or not this tradition remains relevant to the lives of current teachers revealed in the practitioner researcher.

Given that I was conducting a case study of the Institute, I was granted access to the Institute’s current historical and reference documents. Amongst the documents analysed, the Message of the XXII General Chapter was of fundamental importance. The document outlined the leadership profile for the viability and vitality of Marist life and mission over the next eight years (2017-2025), as well as electing a new leadership team for the Institute, composed of the Brother Superior General, the Brother Vicar General, and the six General Councillors. The second key document for the analysis was the Strategic Plan for General Government 2017-2025. The strategic plan was an important source of information in that it provides a broad vision of the strategies and initiatives developed for forming future Marist leaders.

A review of the literature enabled a deeper understanding of how leadership is currently perceived in charismatic religious institutions and its role in the transmission of the charism. Certain documents of the Institute were fundamental for the collection, analysis and interpretation of the field research, contributing to a review of the literature from theological, philosophical and sociological perspectives. Conclusions drawn from the literature analysis will be considered of equal value to the results and findings obtained from the interviews and questionnaire collected through field research. This work, as demonstrated by Lydon (2011, 26), “constitutes a dialogue between text and context, between tradition and contemporary practice”.

5.4 RESEARCH METHODOLOGY

The definition of the methodology is fundamental for the development of any given study, encompassing all the necessary steps from the beginning of the investigation to its conclusion and the presentation of study findings. This definition contributes to the researcher being able to develop research in a systematic and coherent manner, making it possible to obtain results more assertively. Murtonen (2015, 685) defines research methodology as “a wide domain that includes the general principles of science, different paradigms (e.g., positivistic and naturalistic), approaches (e.g., qualitative and quantitative), and the methods and subdomains connected to these, for example statistic”. For Rajasekar *et al.* (2013, 5), methodology can be defined as “. . .the procedures by which researchers go about their work of describing, explaining and predicting phenomena”.

At the heart of research is the production of knowledge (Flick 2020, 6). The findings of research or new knowledge can have a significant impact on various aspects of society. Therefore, and according to Flick (2020, 8), research can be used to “. . .explore issues, fields and phenomena and provide first descriptions, discover new relations by collecting and analysing data, provide empirical data and analyses as a basis for developing theories”.

Research methodology can differ according to the problem or objectives defined by the researcher (Cervo and Bervian 2002, Gil 1999). It is important to consider the research methodology characteristics according to which area the object of study belongs. This can indicate the process or trajectory the researcher should apply when conducting his/her chosen investigative work. For Flick (2020, 5), research can be considered as:

. . .the systematic analysis of research questions by using empirical methods (e.g., of asking, observing, re-using and analyzing data). Its aim is to make empirically grounded statements that can be generalized or to test such statements. Various approaches can be distinguished as can a number of fields of application (health, education, poverty, etc.). Various aims can be pursued, ranging from an exact description of a phenomenon, to its explanation, or to the evaluation of an intervention or institution.

All procedures adopted are essential to the research process, as they enable researchers to respond to the problem under analysis and to achieve the study goals that have been set. For Vergara (2005), procedures allow new scientific paths to be traced when findings present new perspectives for the phenomenon being studied. Such procedures are necessarily aligned with the type of research approach that is to be undertaken.

Case study research, which is of an empirical-descriptive nature, adheres to two different paradigms: qualitative and quantitative. Given the necessity for these two paradigms to coexist in order to better understand the object of this particular case study, this research applies the mixed methods approach. The mixed methods approach allows for a better understanding of the object of study through a transversal dialogue between the themes emerging from the results using procedures that are both qualitative and quantitative. This also allows both a greater proximity with the object of study, as well as for detailed information to be obtained through interviews and a questionnaire.

5.5 MIXED METHODS APPROACH

Methods are defined by Cohen *et al.* (2007, 47) as a “range of approaches used in educational research to gather data, which are to be used as a basis for inference and interpretation, for explanation and prediction”. Walliman (2011) and Bailey (1994) refer to methods as instruments and/or tools used by researchers in their investigation.

The choice of which type of research approach is to be applied to the object of study or to achieve the objectives of a given study project is of paramount importance. This choice can often be challenging, however. For Kuhn (1970, 29), “often a paradigm developed for one set of phenomena is ambiguous in its application to other closely related ones”. For the data collected to be useful for the research, it is important to properly integrate the tools that are used in the research.

According to Cohen *et al.* (2007, 6), “people attempt to comprehend the world around them by using three types of reasoning: deductive reasoning, inductive reasoning and the combined inductive-deductive approach”. From this perspective, research

approaches can be classified into three types: qualitative, quantitative and mixed. For the purposes of this study and considering the need to process data via both the qualitative and quantitative approaches, the mixed methods approach was selected. Given that qualitative and quantitative approaches are not mutually exclusive, this mixed method allows for greater complementarity, offering the researcher a deeper and more accurate vision of the object of study. Even if the research is of a more qualitative nature, quantitative data will prove fundamental for study findings.

In order to understand the mixed method, a better grasp of “qualitative research” and “quantitative research” is fundamental. For Flick (2020, 9), these two terms form part of a broader set of approaches, methods and theoretical backgrounds, which are based on these two paradigms.

5.5.1 Qualitative Research

Qualitative research can be defined as a methodology of exploratory—and therefore inductive—character. It creates a direct contact for the researcher as observer with the participants of the study, exploring their opinions, experiences, feelings, and visions, which are the elements of analysis. This methodology allows for a more thorough exploration of participants’ answers, to obtain a clearer vision of the case under study.

Creswell and Clark (2018, 3) define qualitative research as:

...an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem . . . involves emerging questions and procedures, data typically collected in the participant’s setting, data analysis inductively building from particulars to general themes, and the researcher making interpretations of the meaning of the data.

According to Strauss and Corbin (1988, 10–1), qualitative research can be understood as:

...any type of research that produces findings not arrived at by statistical procedures or other means of qualification. It can refer to research about persons’ lives, lived experiences, behaviours, emotions, and feelings as well as about organizational functioning, social movements, cultural phenomena, and interactions between nations.

In this sense, qualitative research contributes to the researcher achieving closer contact with the reality of the observed phenomenon. According to Stake (1995, 9), the researcher has both the privilege of paying closer attention to that which he considers interesting in the study and the obligation to make conclusions regarding that which he

finds significant in his interaction with the phenomenon under analysis. As such, by recognising that the interpretation is the most important part of the research, the investigator seeks to preserve the multiple realities and differences, as well as that which is contradictory in the studied phenomenon (Stake 1995, 12).

5.5.2 Quantitative Research

Quantitative research is the second type of approach that comprises the mixed method approach. Even though in this particular case study research the qualitative approach will be more utilised, quantitative research will also have a fundamental role for the validation and confirmation of the study findings.

For Creswell and Clark (2018, 3), “. . .quantitative research is an approach for testing objective theories by examining the relationship among variables.” According to these same authors (2018, 3), these variables can be measured for the most part using statistical methods, such as analysing questionnaires or other research. According to Flick (2020, 10), in the case of qualitative research, measurement procedures are key to discovering the differences in the study elements in comparison to the characteristics of the object under analysis.

Qualitative research is of a deductive nature (Rovai *et al.* 2014). In qualitative research, the investigator’s focus is on the external world, and as such, “. . .an objective reality independent of any observations” (Rovai *et al.* 2014, 4). According to Almalki (2016, 290), this reality can be divided into smaller pieces in order to be gleaned. It is in relation to these smaller pieces that observations can be made, hypotheses tested and reproduced in relation to the variables.

5.5.3 Mixed Methods

Mixed methods research integrates qualitative research and quantitative research. According to Creswell (2007, 27), this type of research approach combines or associates the two methods, insofar as one is necessarily more prevalent than the other, at the same time as they are complementary in their presentation of findings. Mixed methods research aims to generalise qualitative findings, deepen the understanding of quantitative results, or corroborate study findings, be they qualitative or quantitative (Galvão *et al.* 2018, 8).

Tashakkori and Creswell (2007, 4) define mixed methods research as:

a research design in which the researcher collects and analyses data, integrates the findings, and draws inferences using both qualitative and quantitative approaches or methods in a single study or a program of inquiry.

This definition is corroborated by Steve Currall (in Johnson *et al.* 2007, 119), who affirms that the “mixed methods research involves the sequential or simultaneous use of both qualitative and quantitative data collection and/or data analysis techniques”.

Data collection techniques and instruments that differ in the qualitative and quantitative approaches can become complementary in the mixed methods approach. Creswell and Clark (2018, 13) confirm that “qualitative data tends to be open-ended without predetermined responses while quantitative data usually includes closed-ended responses such as found on questionnaires or psychological instruments”. In the case of a mixed methods approach, “. . .the researcher makes inferences across both the quantitative and qualitative databases” (Creswell 2014, 22). Amongst the data analysis techniques associated with mixed methods, Galvão *et al.* (2018, 9) highlight content, thematic, and statistical analyses.

According to Creswell and Clark (2018, 5), some key components should be considered when conducting a mixed methods study, since this approach combines methods, research designs and philosophical orientations. For these authors (2018, 5), in this type of approach, the researcher:

- Collects and analyses both qualitative and quantitative data rigorously in response to research questions and hypotheses,
- integrates (or mixes or combines) the two forms of data and their results,
- organises these procedures into specific research designs that provide the logic and procedures for conducting the study, and
- frames these procedures within theory and philosophy.⁷

The use of the mixed methods approach offers particular advantages to researchers, amongst which Creswell and Clark (2018, 12–3) highlight the following: optimal usage of the strengths that compensate for any weaknesses in the quantitative or qualitative research methods; providing more evidence than simple quantitative or qualitative research methods alone to properly study the issue at hand; contributing to

⁷ Bullets as used on the original reference book by the author.

answering questions that cannot be answered through only the quantitative or qualitative research methods; presenting new knowledge that goes beyond what quantitative or qualitative research methods can provide. Bryman *et al.* (2007, 21 cited in Rovai *et al.* 2014, 5) also recognises the advantages of the mixed methods approach as “. . .an overall or negotiated account of the findings that brings together both components of the conversational debate”.

In the case of the mixed methods study design, data collection involves both quantitative and qualitative material, which helps to provide evidence or develop the case (Creswell and Clark 2018, 199). To enhance data collection, both semi-structured interviews and a questionnaire with both open and closed questions were employed.

5.6 QUALITATIVE METHODOLOGY—THE INTERVIEWS

For this “case study”, the interviews employed for the purposes of data collection followed the mixed methods approach. For Creswell (2013, 173), interviews are dialogues that are focused specifically on the information which is of interest to the researcher.

The interview provides information for the researcher, is based on the researcher’s agenda, leads to the researcher’s interpretations, and contains ‘counter control’ elements by the interviewee who withholds information.

The semi-structured face-to-face interview was the interview type adopted for the purposes of this study. This interview model offers a range of possibilities which assist in responding to the complexities of a given object of study. For Galletta (2012, 24), “the semi-structured interview provides a repertoire of possibilities. It is sufficiently structured to address specific topics related to the phenomenon of study, while leaving space for participants to offer new meanings to the study focus”.

5.6.1 The Interview Participants

To achieve this study’s objectives, interviews were conducted with the General Council and the General Bursar, the main global Marist leaders of the Marist Institute for the 2017-2025 period. The General Bursar is responsible for defining the Institute’s policies and guidelines for managing the Institute’s assets. The General Council has the authority and the responsibility to promote the development of the Marist life and mission at all levels of the Institute. The Council is composed of six General Councillors, the

Brother Superior General and the Brother Vicar General. The Institute's General Bursar is a guest participant at all Council meetings. As such, there were eight interview participants, excluding the researcher, who is also a member of the Council.

5.6.2 Research Sample

The type of sampling employed to select the interview participants was a purposive sampling. According to McCombes (2019), this type of sampling enables the researcher to select participants in line with those they believe will best respond to research objectives. Further, Ball (1990) affirms that:

in many cases purposive sampling is used in order to access 'knowledgeable people', i.e., those who have in-depth knowledge about particular issues, maybe by virtue of their professional role, power, access to networks, expertise or experience.

The Table 2 below contains the region and country of origin of each of the global Marist leaders interviewed.

Participants Origin		Global Marist Leaders Participants		
Marist Region	Country	Superior General Vicar General	General Councillors	General Bursar
Africa	<i>Madagascar</i>		1	
Asia				
Europe	<i>Spain</i>	1	2	
Americas	<i>Mexico</i>	1		
	<i>United States</i>		1	
	<i>Colombia</i>			1
Oceania	<i>Australia</i>		1	
Total		2	5	1

Table 2. Number of Interview Participants by Marist Region: Global Marist Leaders
Researcher's source, 2021.

For the purposes of this study, it is important to highlight that that, I as researcher am one of the members of the General Council. According to Chavez (2008, 481), "insiders can understand the cognitive, emotional, and/or psychological precepts of participants as well as possess a more profound knowledge of the historical and practical

happenings of the field”. This thought is corroborated by Brannick and Coghlan (2007), who note “pre-understandings” as one of the main advantages an investigator can bring to internal research. In this regard, the researcher’s knowledge of the Institute favoured the development of “research questions based on rich understandings of the issues needing investigation, providing information about what an organization is really like and what is significant” (Fleming 2018, 312).

5.6.3 The Interview Data Collection

To begin the interview process, an “Invitation Letter” was directed to each of the participants (Appendix A), as well as a “Participation Information Sheet” (Appendix B) presenting the objectives and justification of the research, and a “Consent Form” (Appendix C) indicating the participant’s consent to the interview. The contact with the eight participants was initially conducted via email. Through this means of communication, it was possible to confirm the eight personal interviews, guaranteeing a 100% participation of the global Marist leadership.

From the first point of contact onwards, the global Marist leaders, all members of the General Council, offered their opinions about the best way to participate in the research project. In preparatory dialogue with the participants, many expressed their belief that the study was important for the Institute in its desire and need to strengthen formation programmes for leaders in the present context. Principal characteristics of the current context include the growth of the Marist mission in various parts of the world, the reduced number of new vocations for Marist Brothers and the impressive growth in laypeople who are engaged with and committed to the Marist life and mission. As such, reflecting on and concentrating efforts towards developing leaders with the necessary profile to take on the Institute’s new reality has proved of fundamental importance.

Considering the 2021 COVID-19 pandemic and its impact in Italy where the interviews were conducted, all Italian preventative rules were strictly followed, such as social distancing and the use of Personal Protective Equipment (PPE). This guaranteed greater safety and comfort for both interviewees and interviewer.

Qualitatively speaking, the interviews “were based on data collated in interpersonal interactions and on the informants’ co-participation in situations, which were analysed on the basis of the significance that the former gave to their actions” (Chizzotti 2000, 52). As such, it was important to not only consider the participants’

current vision and impressions regarding the future prospects for the formation of Marist leaders, but also their own formative experiences and past and present actions as leaders in the Marist charismatic family.

All interviews were conducted personally by the researcher during the month of June 2021 at the General House of the Marist Brothers, the Institute's global headquarters in Rome, Italy. Even though all the interview participants come from different parts of the world, they live and work at this location. Of the eight interviews conducted, six were in English and two were in Spanish.

In total, ten guiding questions were posed during the interviews (Appendix D). To better respond to the purpose of the study, the interviews were organised into three thematic segments. The study objective was defined as identifying the essential elements for the formation of prophetic and collaborative leaders. This procedure enabled the interviews to begin with more general elements, gaining depth as the dialogue advanced. As such, the interview questions were designed to start from each participant's personal experience, particularly regarding their vision of the formation of Marist leaders of the Institute, progressing gradually towards the key elements of the investigator's interest. This type of organisation corroborates with Patton (1990), whose research affirms that "qualitative interviewing begins with the assumption that the perspective of other is meaningful, knowable and able to be made explicit".

The first set of questions dealt with the interviewees' personal information and the history of their formation as global Marist leaders. Aside from general personal data, prioritised themes included academic, religious, Marist and leadership formation. The interview also focused on the participants' experiences as leaders since they became Marist Brothers, as well as the essential contributory elements of their formation and experience as leaders.

The second set of questions was directed at exploring the participants' perception of current formative processes for Marist leaders at the Institute. Questions pertained to the strengths, challenges and opportunities of this formation of Marist leaders. Also present was the issue of how current formation processes respond to the calls of the XXII General Chapter, particularly regarding leadership types and which challenges are involved in leadership, management and governance of the Marist Institute.

Finally, the third set of questions pertained to the role of General Council members as global Marist leaders in guaranteeing the attraction and formation of collaborative, prophetic leaders for the vitality and continuity of the Marist charism.

Questions were posed regarding the roles of laypeople and Brothers in the Marist life and mission. At the conclusion of the interviews, participants were given the opportunity to add or highlight any aspects of interest or points of view regarding the themes explored.

With the written and signed consent of all participants, the interviews were recorded in order to later be transcribed, allowing both for a more favourable atmosphere and to guarantee the veracity of all information shared regarding the themes of interest for the study. According to Bryman (2012, 219), recording interviewees' answers should be a part of an interviewer's task to guarantee that the written register of participants' responses is conducted in the most accurate fashion possible.

There were a total of eight hours and 48 minutes of audio recordings. Interviews in English and Spanish were transcribed by two specialised professionals (Appendix E). The two interviews conducted in Spanish were translated by the researcher into English.

5.6.4 Data Analysis of the Interviews

For data analysis purposes, a series of communication analysis techniques were used on the interview transcriptions. The intention here was to describe the content of the indicative messages through systematic, objective procedures, irrespective of whether these messages were quantitative or qualitative, thereby permitting the inference of knowledge relative to the conditions of production/receptions (inferred variables) of said messages (Bardin 2010, 44). According to Braun and Clarke (2006, 86), a "thematic analysis involves the searching across a data set—be that a number of interviews or focus groups, or a range of texts—to find repeated patterns of meaning".

When referring to the content analysis methodology, Bardin (2010, 121) defines the different phases along three chronological poles: pre-analysis; the exploration of the material; the treatment of results and inference and interpretation. However, Braun and Clarke (2006, 87) propose thematic analysis in six phases: familiarising yourself with your data; generating initial codes; searching for themes; reviewing themes; defining and naming themes; and producing the report. There is no contradiction in the two proposals, as they are both complementary. As Patton (1990) states, "it is important to recognise that qualitative analysis guidelines are exactly that—they are not rules, and, following the basic precepts, will need to be applied flexibly to fit the—research questions and data".

The pre-analysis phase is the organisation itself, comprising a period for intuitions, where to achieve a precise system, a researcher's initial ideas are systematised and made operational (Bardin 2010, 121).

The exploration of the material refers to the inclusion or exclusion of a given text in accordance with consistent and systematic rules. This means that to test diverse hypotheses, the researcher must analyse all available material, both that which supports his hypotheses and that which do not. This planning, collection and analysis must respect methodological rules (Richardson 1999, 223).

Finally, Bardin's research (2010) was referenced for the treatment and interpretation of findings, particularly with regards to the consideration, significance and validity of data collected, and to properly highlight supplied information. As such, significant and faithful findings allow for inferences and interpretations to be made regarding the proposed objectives.

The categorisation criterion adopted for this research was semantic—with themes placed into categories (Bardin 2010). For example, all themes related to the strong points of Marist formation processes were grouped under the category "Current Strengths". Due to the complexity of the interview, the researcher conducted an initial interpretation regarding the categorisation (Appendix F).

The categorisation process allows for an initial simplified analysis of the findings, which is then followed with inferences from reconstructed material. This makes it possible to interpret the sample under study, as well as promoting the creation of evidence of the characteristics of this corpus. It is also worth noting that analysis findings depend on the researcher's capacity to conduct a proper categorisation, which represents the final quality of the data. This process was divided into three phases.

In the first phase, the NVivo software (version 12.6.0) was used to conduct a textual codification of each interview corresponding to a hermeneutic unit. This was carried out to identify the questions that were emphasised, to converge with the literature revision described in Chapters Two, Three and Four, as well as to respond to those questions which will be presented in Chapters Six and Seven that were not explicitly mentioned. According to Creswell and Clark (2018, 214), "qualitative analysis software programs aid in implementation the core feature of qualitative data analysis: coding".

In this phase, the documents were created and divided into separate quotations (nodes) to facilitate categorical analyses. Each quotation corresponds to extracts from the interviews selected by the researcher. With this, I aimed to engage with and identify the

different elements that are necessary for the formation of prophetic and collaborative leaders who can contribute to the continuity of the Marist charism at the core of the Institute. Each quotation or key word identified generated a separate category or node.

According to Bardin (2010, 173), the use of computers has direct consequences for content analysis as they increase the speed of analysis in a number of different ways: computers afford increased rigour when organising the investigation; they maintain flexibility, by making it possible to use new classified data for new hypotheses; they enable the reproduction and exchange of documents through normalisation and storage; they facilitate the manipulation of complex data; and they boost creativity and reflection.

In the second phase, a data exploration process was launched to identify information and to detect similarities in different participants' discourse. The software resources were used, such as memos and comments, to facilitate the grouping of information. This phase also includes the following developments: the definition of codification categories, counting and registration rules designed for frequent categorisation or counting; the classification and aggregation of information in symbolic or thematic categories, to understand the significance of the rules of registration.

From a data analysis perspective, categories are seen as types or classes which group together given elements according to their common characteristics (Santos 2012, 386). This phase is extremely significant for interpretations and inferences, and the quality of the latter will depend on its success. For Bardin (2010), a registration unit implies a unit that must be codified, be it a theme, a word or a phrase.

Finally, the third phase consists of treating the findings of inference and of interpretation. In this phase, inferential interpretations result from summarising and surveying the information for analysis. According to Bardin (2010), this is the moment for intuition, for reflexive and critical analysis. For Santos (2012, 386), in this phase the researcher must return to his or her theoretical framework, seeking to properly substantiate analyses to give meaning to the interpretations they draw. Interpretations based on inferences seek to unmask that which is hiding behind the meanings of words. In this way, it is possible to present the deeper discourse of any assertions. In this sense, Creswell and Clark (2018, 216) affirm that "an interpretation of results involves stepping back from the detailed results and advancing their larger meaning in view of the research problems, the questions or hypotheses in a study, the existing literature, and perhaps author-related experiences. . .".

Consequently, data analysis can be understood as a thorough reading that is impacted by the linguistic and objective system and the conditions it offers. This assists the researcher in discovering existing relationships between the content of the discourse and its external aspects. Moreover, this technique enables the understanding, usage and application of content (Santos 2012, 387).

5.7 QUANTITATIVE METHOD

An online questionnaire was developed for Marist leaders of the Administrative Units to dialogue with the results of the semi-structured interviews with the members of the General Council. The aim of the use of a questionnaire was to understand how the General Council's strategies and leadership have furthered the vitality and continuity of the Marist charism and formation of leaders, particularly as the global leader on the issue, and how these strategies and leadership were perceived at a local level.

5.7.1 Questionnaire Participants

The participants of the questionnaire were the Marist leaders (Brothers and Laypeople) of the Administrative Units of the Institute⁸. These leaders are the Marist Brothers that serve as Provincials or District Superiors in the Institute's 26 Administrative Units, also referred to as Provinces⁹ or Districts¹⁰, or Brothers with some degree of responsibility at the level of the Administrative Unit. Aside from the Marist Brothers themselves, a layperson from each of these Administrative Units responsible for the Provincial/District processes of Marist life and mission was also invited. The sampling of participants also followed the purposive sampling model, as was the case for the interviews.

⁸ The Marist Institute has 26 Administrative Units in the six regions where it is organised: Asia, Oceania, Africa, Europe, Arco Norte and South America with presence and mission in 79 countries. Among the 26 Administrative Units, 23 are Provinces and three are Districts.

⁹ "The Province is an administrative unit composed of a number of houses whose personnel and material resources are sufficient to assure an autonomous existence. It is governed by a Provincial Superior" (Constitutions and Statutes of the Marist Brothers of the Schools, 2010, 109, article 126).

¹⁰ "The District is an administrative unit comprising a group of houses bond by common interests, but not having the requirements necessary to become a Province. It depends directly on the Superior General or on the Provincial Superior, and is governed by a District Superior" (Constitutions and Statutes of the Marist Brothers of the Schools, 2010, 109, article 127).

Aside from the Province representatives, the six members from the Extended Marist Laity Secretariat were also invited to participate in the questionnaire. This Secretariat comprises Brothers and laypeople who represent the six regions of the Institute. The mission of the Secretariat is to accompany Marist laypeople in their formative processes pertaining to Marist charism and vocational discernment.

Members of the Extended Marist Laity Secretariat were selected for participation in recognition of their important role and knowledge about the formation of laypeople and the joint formation processes of Brothers and laypeople regarding the Marist charism. Considering that Extended Marist Laity Secretariat members represent the six regions of the Institute, there was no risk of generating disproportion in the sample chosen for the research. For the purpose of this study, the group's contributions were of fundamental importance. For Cohen *et al.* (2007, 115):

in this case the researcher will deliberately seek to include a sufficient number of them to ensure appropriate statistical analysis or representation in the sample, adjusting any results from them, through weighting, to ensure that they are not over-represented in the final results. This is an endeavour, perhaps, to reach and meet the demands of social inclusion.

5.7.2 Questionnaire Data Collection

To invite the questionnaire participants, the same process was adopted as for the interviews. An “Invitation Letter” (Appendix G) presenting the objectives and justification of the research, a “Participation Information Sheet” (Appendix H), as well as a “Term of Consent form” (Appendix I) were sent to each of the participants. All contact with participants was conducted via e-mail.

Fifty-two individuals (26 Brothers and 26 laypeople representing the 26 Administrative Units) participated in the questionnaire, representing a 100% success rate of invitations extended. One Marist Brother and one layperson who is active at regional level or conducts mission work and has knowledge of the Marist charism and the Institute's vision were invited from each Administrative Unit. Laypeople's names were sent by Provincials or District Superiors according to the informed criteria.

Aside from the 52 participants from the Administrative Units, six members of the Extended Marist Laity Secretariat were invited, however only five participated, representing a participation percentage of 83%. As such, the number of participants who responded to the questionnaire using Survio online tool totalled 57, or 98% of those who were invited to participate.

Together, the participants were from 23 countries organized according to the six Marist Regions across the world.

Participants Origin		Administrative Unit Marist Leaders Participants		
Marist Regions	Countries	Brothers	Laypeople	
		Male	Female	Male
Africa	DR of Congo	1		
	Ghana	1		
	Madagascar	1	2	
	Nigeria	1		
	South Africa			1
	Zambia	1		
Arco Norte (North and Central America)	Canada	1	1	1
	Colombia	1	1	
	Costa Rica		1	
	El Salvador		1	
	Mexico	2	1	1
	United States of the America	1		1
Asia	Philippines	2	2	
	Sri Lanka	1		1
Europe	Germany		1	
	Ireland		1	
	Spain	5	1	4
South America	Argentina	1		1
	Brazil	4	2	2
	Chile			2
Oceania	Australia	1	1	1
	New Zealand	1		1
	Samoa	1		
Total	23	26	15	16
Total of Participants	57			

Table 3. Number of Questionnaire Participants by Marist Region: AU Marist Leaders
Researcher's source, 2021.

Quantitative questionnaires were distributed across the six Marist regions and according to the Marist organisation of the world (Table 3), each containing 23 questions (Appendix J) in four languages: English, Spanish, French and Portuguese. Questions were identical in each of the four languages. The data collection tool used was Survio online

survey tool (<https://my.surveio.com/>), which made the data analysis possible. The questionnaires were distributed during the month of June 2021.

The Survio online tool provides a Web environment which is totally integrated with the objectives of the study project. This tool also facilitates the presentation and analysis of online research projects and is available for anyone in the public or private sector to use. In addition, the tool is safe and has built-in data protection.

The questions in the questionnaire were based on the Likert scale format. According to Frankenthal (2017), positive aspects of adopting the Likert scale reside in the ease with which the researcher can develop the questionnaire and with which the participant can reply to it, given that there are various possible answers for each question. Another advantage is its adaptability to the digital format, given its visual nature. Participants can quickly understand the logic of the scale and easily compare the items that are filled out, modifying them at will.

The use of the Likert scale is of fundamental importance to this study because it allows the researcher to take the participants' pulse regarding the formation of Marist leaders and the vitality and continuity of the Marist charism. Bryman (2012, 166) affirms that "the Likert scale is essentially a multiple-indicator or multiple-item measure of a set of attitudes relating to a particular area. The goal of the Likert scale is to measure intensity of feelings about the area in question".

The composition of the survey directed at Marist leaders, both Brothers and Laypeople, across the 26 Administrative Units and including the members of the Extended Marist Laity Secretariat, was organised into three parts. The first part was centred on the participants' personal information, such as: nationality, age, formation and initial contact with the Marist institution. Nine questions comprised this section. The second part of the survey focused on the participants' perceptions about their knowledge of the Marist charism, processes of formation and the accompaniment and co-responsibility for the Marist charism between Brothers and laypeople, particularly in the scope of the Marist life and mission. For this part, the participants were asked to choose answers for the ten affirmations on a scale of 1 to 4, where 4 represented strongly agree, 3 agree, 2 disagree and 1 represented strongly disagree. The final part of the questionnaire contained four open-ended questions, with the participants asked to express their understanding about prophetic and collaborative global Marist leadership, strengths and challenges to ensure the vitality and continuity of the Marist charism, as well as the key elements that should guide the formation of Marist leaders in the Institute.

5.7.3 Questionnaire Data Analysis

Given the complementarity of the data from both tools, analysis and treatment of the data derived from the questionnaire also followed the same processes and procedures adopted for the interviews (Appendix K). In the data analysis for the questionnaire, it was observed that two participants responded twice, and another, four times. As such, even before commencing the data analysis, these repetitions were to be eliminated. To facilitate the data analysis, all answers to questionnaires in French, Spanish and Portuguese were translated into English. Based on this data, a single document was compiled with all data collected, and the information was unified. This served as a starting point for the pre-analysis, exploration, treatment, inference and interpretation procedures.

5.8 THE ROLE OF THE RESEARCHER

This study aimed to gain an insiders' perspective on the under-explored area of Prophetic and Collaborative Global Leadership and the charism of the Institute of Marist Brothers. The research process is a dynamic process, and my approach was an active role, acknowledging my own experience and beliefs. As Creswell (2013, 182) acknowledges, "the personal-self becomes inseparable from the researcher-self". It was, therefore, essential that personal values, assumptions and biases were identified from the beginning of the research. Nightingale and Cromby (1999, 228) state taking a reflexive approach involves an exploration of "how a researchers' involvement with a particular study influenced, acted upon and informed the research" which is one advanced by Meyrick (2006) who suggests that it supports more objective data collection.

In the view of Lincoln and Guba (2000), a personal analysis and interpretation of data provides rigor within my data collection. As a Marist for many years and a member of the General Council, this permitted me to discuss different perspectives with some 'authority' having insider knowledge (Crossley and Watson, 2003, 26).

5.9 ETHICAL CONSIDERATIONS

In regard to research integrity, an understanding of 'trustworthiness' as a measure of validity (Basse 1999) was underpinned by the data gathering, analysis and interpretation in regard to Prophetic and Collaborative Global Leadership and the charism of the Institute of Marist Brothers. As Lincoln and Guba (1985, 290) state, trustworthiness

ensures that any findings are ‘worth paying attention to’. It was important that the research participants were made aware of the aims of the research, its voluntary nature, confidentiality and anonymity of any responses, as advocated by Cohen *et al.* (2007). Via a participant information sheet and consent form, respondents were, therefore, made aware that their names would remain anonymous throughout the research, and that all data would be stored securely throughout and beyond the research project. Voluntary and informed written consent was verified at the start of each interview. In order to respect all participants, anonymity and confidentiality of all respondents was carefully safeguarded through labelling them as a number, for example Marist Global Leader 1, and transcripts were saved in password protected files on the university’s secure computer network as advised by BERA (2018).

Approval was requested and obtained to conduct the project from the University Ethics committee (Appendices L, M and N), adhering to BERA (2018) and University ethical guidelines. All participants were informed of their right to withdraw and that they could refuse to answer questions at any point during the study, ensuring participants had contact details to withdraw or raise any queries at a later date. By giving all respondents a number, it would be easy to identify and exclude their data at any point. Respondents to the questionnaire could subsequently remove data using the unique identifier code they would have received on completion of the questionnaire.

5.10 METHOD LIMITATIONS

When any given research project is conducted and its respective methodological configuration employed, no method can be considered sufficiently complete to encompass all phenomena related to the investigation process. As such, procedures and techniques used can present inherent limitations to the integrity of each technique.

Regarding the interview process, it is recognised that there is a tendency for participants to omit certain information when it could be considered compromising. To reduce this limitation, the researcher sought to develop interviewee-interviewer trust relationships, creating a harmonious atmosphere in which the interview could take place.

Regarding the questionnaire, there were some cases in which additional emails were exchanged for the purpose of discussing the research and clarifying the role of the participants, as well as regarding certain practical aspects in using the Survio online tool.

The interviewer's experience and formation were essential to the smooth functioning of the interviews. On this issue, Merriam (2009) affirms that:

the researcher is the primary instrument of data collection and analysis. This has its advantages. But training in observation and interviewing, though necessary, is not readily available to aspiring case study researchers. Nor are there guidelines in constructing the final report. The investigator is left to rely on his or her own instincts and abilities throughout most of this research effort.

A sampling that could properly represent the reality of the Institute proved to be a significant challenge, given the Institute's presence in 79 countries, implying a wide diversity of cultures, contexts and languages. The careful selection of the leaders of the Administrative Units, both Brothers and laypeople, was important in reducing this difference and making it possible to present data that most closely resembles the present reality of the Institute.

In a case study research project using the mixed methods approach, it is extremely important to balance the weaknesses of one given method with the strengths of the other (Onwuegbuzie and Johnson 2006). Considerable effort and care were taken by me regarding internal and external biases of both a qualitative and quantitative nature. It is for this reason that the researcher chose to apply the mixed methods approach, precisely to avoid both types of bias.

According to Ryan *et al.* (2002, 141), when it comes to quantitative research “. . . the ultimate question is whether we can draw valid conclusions from a study given the research design and controls employed”. According to the same authors (2002, 155–6), “in qualitative research, contextual validity refers to the credibility of case study evidence and the conclusions drawn”. Similarly, for Tashakkori and Teddlie (2003, 694), “the primary focus of such research is to capture authentically the lived experiences of people and to represent them in a convincing text, which demonstrates that the researcher fully understands the case”.

To avoid the generalisation of results in the creation of connections and data analysis and to provide an accurate vision of the formation of Marist leaders, the research objective was to depict the essential issues through the data collected, to respond to the guiding question posited at the beginning of the project in the most real way possible.

CHAPTER SIX

THE PERCEPTION OF MARIST ADMINISTRATIVE UNITS’ LEADERS ON LEADERSHIP FORMATION

6.1 INTRODUCTION

Chapters six, seven and eight present the results and findings of the quantitative and qualitative analysis of the data collected by using an online questionnaire and semi-structured face-to-face interviews. Chapter six presents the results of the quantitative and qualitative data analysis of the online questionnaire, while Chapter seven describes the results of qualitative data collected from semi-structured face-to-face interviews. To facilitate this analysis, these chapters have been treated as two separate “vertical units”. Finally, Chapter eight presents the findings of the analysis of themes that have arisen from the data analysis of Chapters six and seven which respond to the challenges of this research and its objectives, giving an account of the study findings as a whole.

This chapter provides an analysis quantitative data collected through an online questionnaire using the Survio online survey tool. The objective was to analyse the role of the General Council, as the global leader of the Institute, in ensuring the formation of prophetic and collaborative leaders. A parallel aim was to identify current strengths, challenges and opportunities from the perspective of Marist leaders in Administrative Units, in leadership formation processes designed to contribute to the continuity and vitality of the Marist charism.

As described in Chapter Five pertaining to methodology, a questionnaire was organised and applied in four different languages: five in French, nine in Portuguese, 22 in Spanish and 22 in English. The data collected through these questionnaires was unified into a single report and translated into English for analysis. 58 Marist leaders were invited to respond to the questionnaire and 57 (98%) responded. The participants are all Brothers and lay Marists, invited to participate as leaders from the 26 Administrative Units (AU) in 23 countries, within the six Marist regions of the world. In order to preserve participants’ confidentiality, the 57 Marist Leaders of the Administrative Units are coded in this research project as “AU Marist Leader 1” and successively until “AU Marist Leader 57”.

The chapter is divided into five thematic sections, with the first and second sections of a quantitative nature and the third to fifth sections of a qualitative nature. The first section presents participants' demographic data, and the second section examines how the Marist leaders of Administrative Units view current leadership formation programmes. In the third section, the understanding of a global, prophetic and collaborative leader is explored. The fourth section demonstrates the strengths and challenges for leadership formation. Finally, the fifth section presents qualitative data on the key elements for the formation of prophetic and collaborative leaders for the vitality and continuity of the Marist charism. It should be emphasised that themes examined in all sections are from the perspective of Marist leaders in Administrative Units (AU).

6.2 PROFILE OF THE PARTICIPANTS

This section will present research participants' demographic data.

Of the 57 AU Marist Leaders who responded to the questionnaire using the Survio online survey tool, 53% identified themselves as lay Marists and 47% as Marist Brothers (Figure 5).

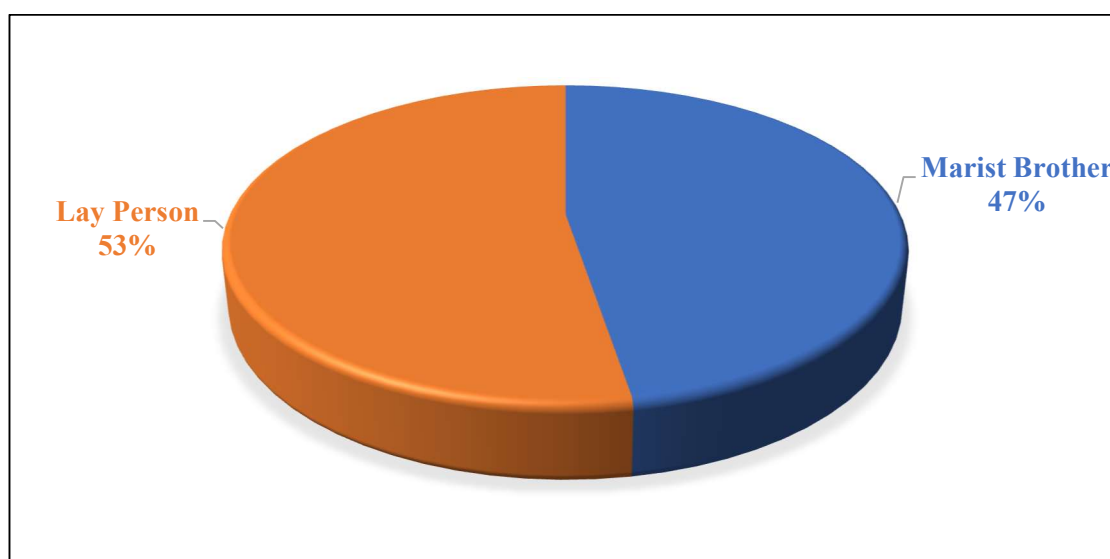


Figure 5. Distribution of Participants According to Type of Attachment to the Marist Charism
Researcher's Source, 2021.

As for gender classification, Survio online survey tool presented the following configuration: 74% of participants identified themselves as male and 26% as female. The significant difference in the percentage between men and women is due to the fact that

47% of participants are Marist Brothers (exclusively male) and 53% of the lay participants are divided into 15 (26.5%) men and 15 (26.5%) women. Regarding the age group, three (5.26%) participants are between 25 and 35 years of age, nine (15.79%) participants are between 36 and 45 years of age, 25 (43.86%) participants are between 46 and 55 years of age, 15 (26.32%) participants are between 56 and 65 years of age, and finally, five (8.77%) participants are between 66 and 76 years of age (Figure 6). It can be observed that the vast majority of Marist Leaders who responded to the questionnaire are in the above 46 years old age bracket, which corresponds to 40 AU Marist Leaders, or 70.18% of the total participants.

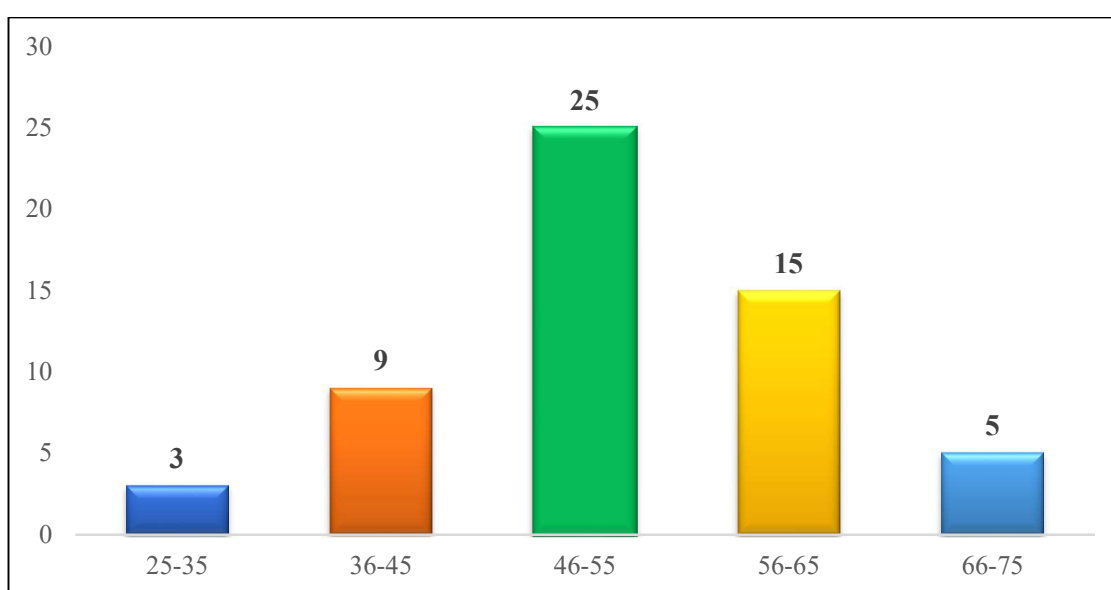


Figure 6. Distribution of Participants by Age Group
Researcher's Source, 2021.

The 57 participating AU Marist Leaders represent 23 different nationalities, which correspond to the six Marist Regions around the world: from the Africa Region—one from the Democratic Republic of Congo, one from Ghana, one from Nigeria, one from South Africa, one from Zambia and three from Madagascar; from the Arco Norte Region—one from Costa Rica, one from El Salvador, two from Colombia, two from the United States of America, three from Canada and four from Mexico; from the Asia Region—two from Sri Lanka and four from the Philippines; from the Europe Region—one from Germany, one from Ireland and ten from Spain; from the South America Region—two from Argentina, two from Chile and eight from Brazil; from the Oceania Region—one from Samoa, two from New Zealand and three from Australia. The largest

concentration of leaders by nationality can be found in Spain and Brazil due to the large Marist presence in both of these countries. It is worth noting that some leaders from these two countries (Brazil and Spain) currently live and work in other parts of the Institute, which do not represent their nationality.

Regarding this research project's focus on the formation of Marist leaders, it was considered important to identify their academic formation, as well as participants' religious, spiritual, and Marist formations.

With regards to academic formation, 100% of the participants have completed their higher education: 47% have at least an undergraduate degree, 46% indicated that they have a Master's degree in addition to their first degree, and 7% have an undergraduate degree, a Master's degree, and at least one doctorate or PhD¹¹ (Figure 7).

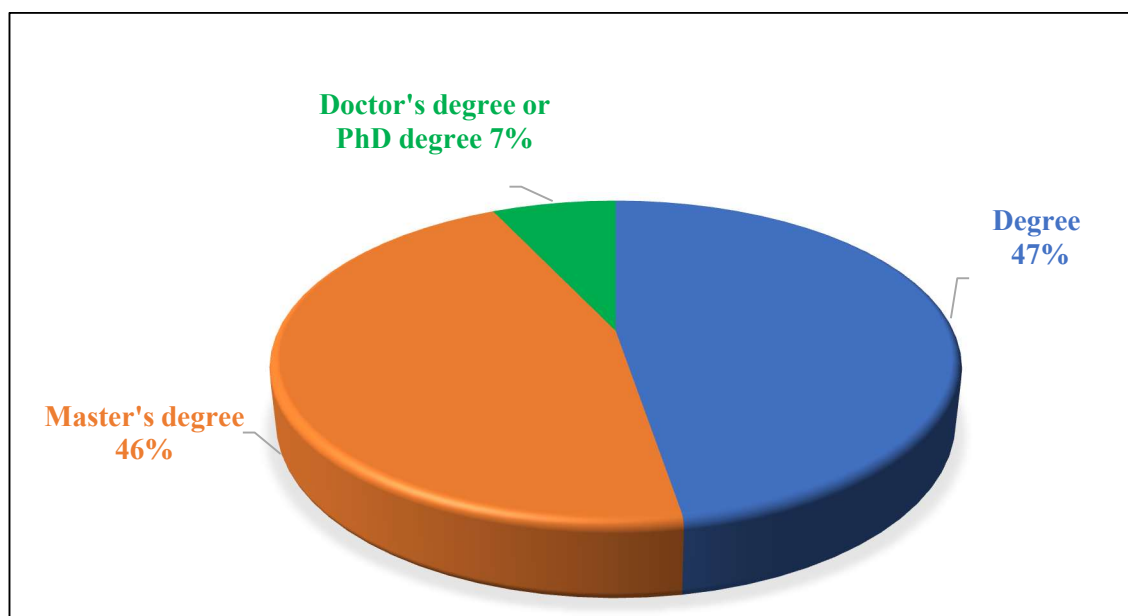


Figure 7. Distribution of Participants by Academic Formation
Researcher's Source, 2021.

Not all respondents indicated their respective areas, with some only mentioning the level of their degree (undergraduate, master's or doctorate). The participants who did specify their educational background come from the following areas: Pedagogy, Biology, Communications, Modern Languages (French, English and Spanish), History, Psychology, Education, Social Psychology, Computer Engineering, Religious Sciences,

¹¹ Considering the diversity of participants' nationalities, each country has different criteria to define associated degree titles.

Theology, Accounting, Chemistry, Management, Educational Leadership, Youth Ministry, Religious Education, Pastoral, Guidance Counselling, Arts in Theology and Physics.

With regard to *religious, spiritual and Marist formation*, presented as a multiple-choice question, 100% of participants selected a religious formation, 98% a spiritual formation and 93% a Marist formation (Figure 8). However, it was not possible to identify all the participants' different areas of formation (within the three above options) because some participants did not name them. Religious formations cited by participants included: Roman Catholic Church sacraments, Catechesis, Theology and Pastoral (undergraduate degrees and master's degrees), Religious Sciences degree, Youth and Vocational ministries, Pastoral Leadership and Management in Mission, Pastoral Counselling, Pastoral Education and religious workshops. It can be observed that for some participants, formations were of an academic nature, while for others, it was through workshops and seminars promoted by different ecclesial and institutional entities.

The different fields and modalities of spiritual formation cited by participants can be divided into two types: the first is academic, by way of undergraduate and graduate studies, and the second comprises extension courses promoted by participants' local Churches and the Institute. For those who selected the academic option, the fields of spiritual accompaniment, psycho-spiritual accompaniment, and spiritual direction were cited. The following specifics are particularly worth mentioning: local and international spiritual programmes, participation in retreats and spiritual exercises, spiritual workshops, participation in Marist Youth Ministry groups, seminars and holiday courses on spirituality.

Finally, regarding *Marist formation*, the areas and modalities indicated by the participants were: a) areas: consecrated life, vocation of Marist Brother, Marist life and mission, life of the Founder Marcellin Champagnat, Marist spiritual heritage, accompaniment and vocational processes, Marist Youth Ministry, Marist leadership and governance, accompaniment of the lay Marist vocation, formation and accompaniment of future Marist Brothers, and leadership of communities of Marist Brothers; b) modalities: initial formation to become a Marist Brother, ongoing formation and joint formation of Brothers and laity at the local and international levels regarding the Marist charism, local and international programmes regarding the Marist charism and vocation, Marist leadership programmes, visits to historic Marist sites, and online Marist formation.

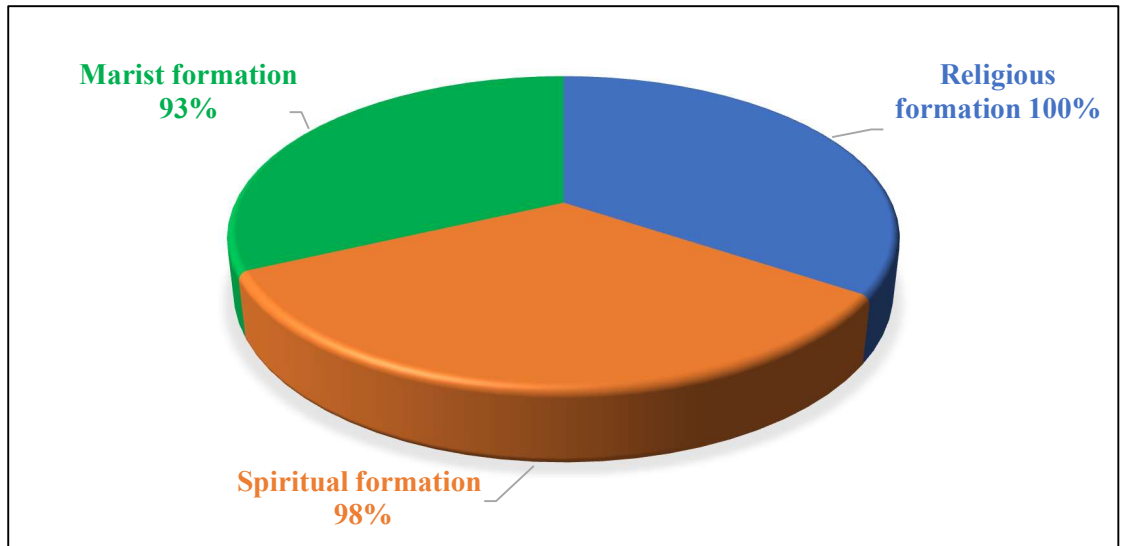


Figure 8. Distribution of Participants by Religious, Spiritual and Marist Formation
 Researcher’s Source, 2021.

With respect to the role of AU Marist Leaders who answered the questionnaire, as shown in Figure 9, 42% of participants identified themselves as a Provincial or District Leader, 12% as teachers, 12% as a director of a Marist work, 34% as a director or coordinator of a department at the level of the Administrative Unit.

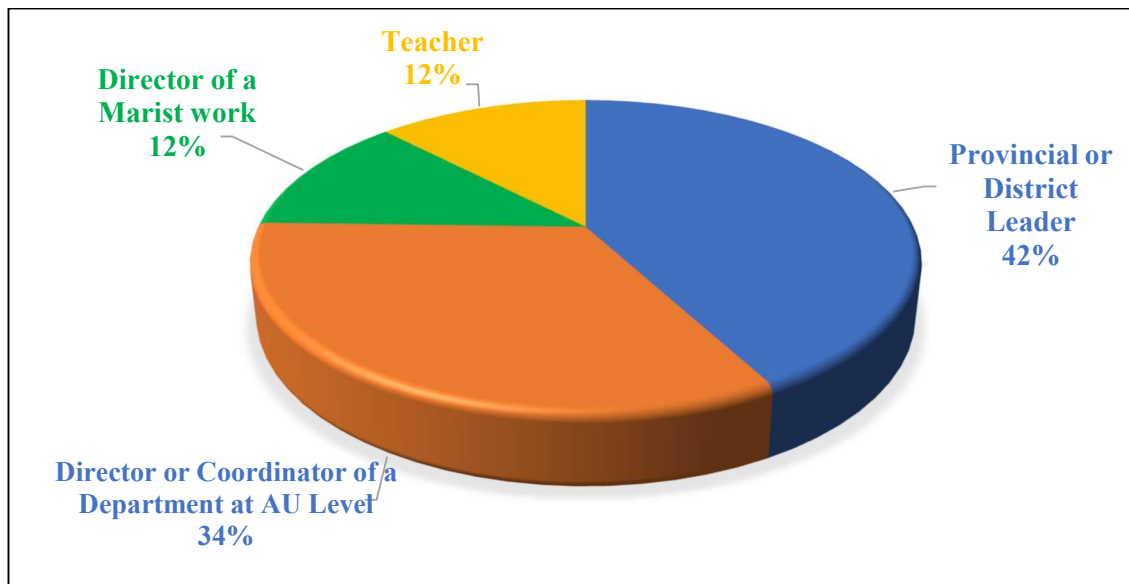


Figure 9. Distribution of Participants by Current Role in the Institution
 Researcher’s Source, 2021.

Regarding the time spent in the Institute, five (8.77%) participants reported a duration of 0-10 years, 12 participants (21.05%) reported 11-20 years, 15 participants

(26.32%) reported 21-30 years, 15 participants (26.32%) reported 31-40 years, eight participants (14.04%) reported 41-50 years, and finally two participants (3.51%) reported 51-55 years as a part of the Institute (Figure 10). It can be seen that 43.87% of participants are over 30 years of age. It is important to consider that 47% of the participants were Marist Brothers, which in some cases justifies their length of time in the institution.

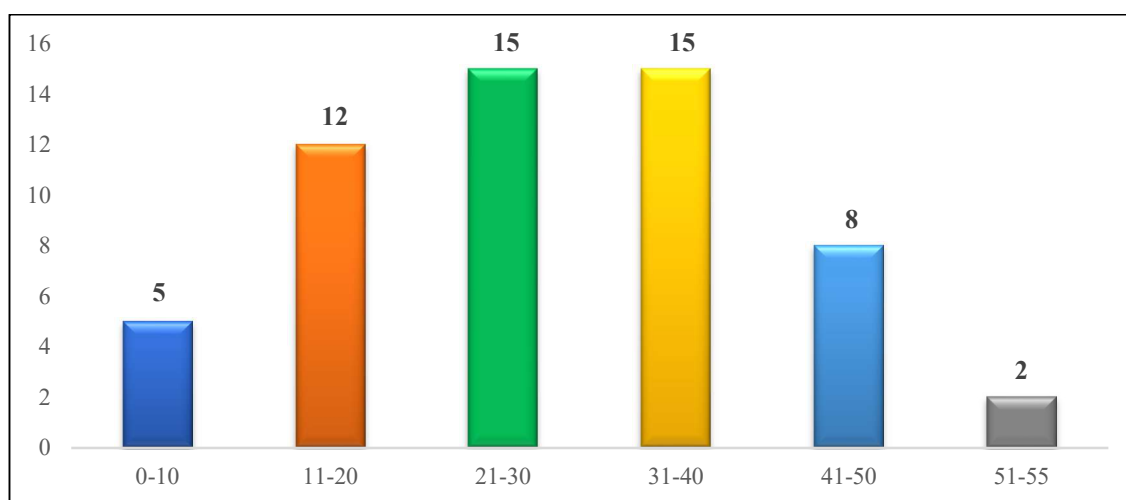


Figure 10. Distribution of Participants by the Length of Time They Have Been in the Institution
Researcher's Source, 2021.

Finally, it was ascertained whether participants had studied in a Marist school before becoming part of the institution as a Marist Brother or layperson. The aim of the question was to understand how a bond initiated within the Marist school system may or may not have influenced participants' continued institutional commitment and their evolution as Marist leaders. Of the participants, 37% answered that they had not studied in a Marist school and 63% confirmed that they had. This data clearly demonstrates the need to strengthen Marist leaders' formation programmes with a view to maintaining the vitality of the charism from elementary school education onwards.

6.3 A LOOK AT CURRENT FORMATION PROGRAMMES ON MARIST CHARISM

In this second section, the objective is to present how Marist leaders in Administrative Units perceive current programmes of leadership formation regarding the Marist charism. In this regard, five categories of analysis have been identified: *formation programmes for Marist leaders; knowledge of the Marist charism; Knowledge of the*

Marcellin Champagnat's Impact on the Marist Mission; commitment of the current General Council to the formation of collaborative leadership; and co-responsibility of Brothers and laity in the Marist life and mission.

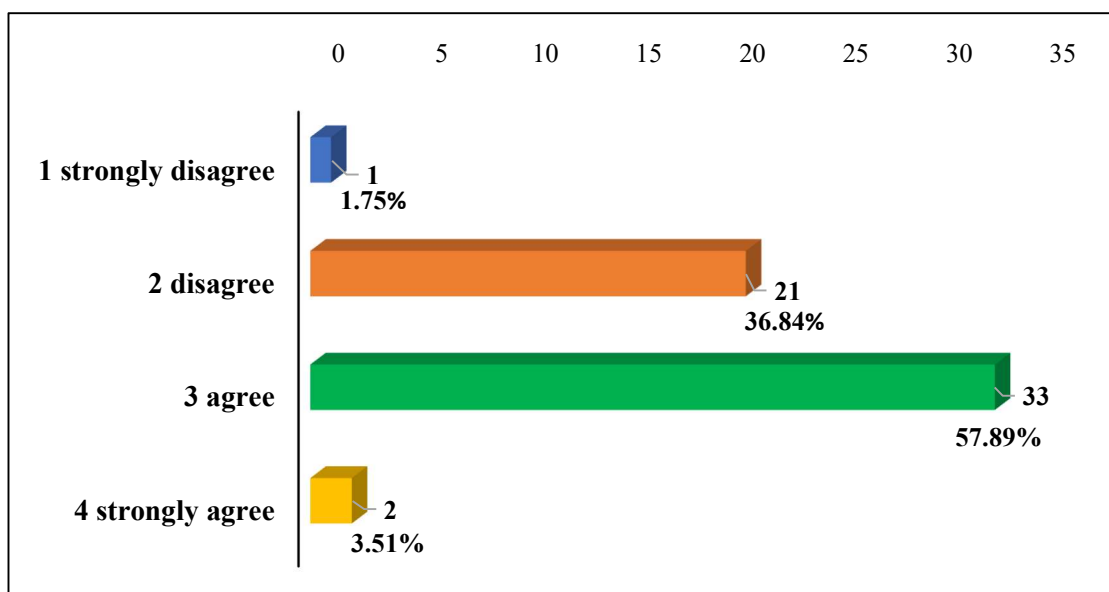
For the purposes of the questionnaire, the Likert scale was used, as already explained in Chapter Five relating to methodology, whereby participants were encouraged to express their perspectives on a scale of 1 to 4 regarding ten statements, where 1 represented strongly disagreeing, 2 disagreeing, 3 agreeing, and 4 strongly agreeing. For the analysis of the data collected, the more reliable Median Rank was also used (Martin 2016, 62). It should be noted that the number of lay respondents is 11% higher than the number of Marist Brothers, however this does not interfere with the weight of the responses.

6.3.1 Formation Programmes for Marist Leaders

The first category concerned *formation programmes for Marist leaders*. The objectives for analysing this category were: to identify whether there are sufficient programmes on the Marist charism designed to attract and form leaders at all levels of the Institute; to understand whether the current processes of formation properly respond to Brothers' and lay Marists' current need to maintain the vitality and ensure the continuity of the Marist charism; and finally, whether current formation programmes and processes are helping to create a vision of vitality and continuity for the future of the Marist charism.

6.3.1.1 Number of Programmes Offered for Attracting and Forming Leaders

Figure 11 presents the rates of agreement of Marist leaders as to whether there are sufficient programmes relating to the Marist charism designed to attract and form leaders at all levels of the Institute. Of the 57 research participants, 61.4% agreed that there are sufficient programmes. Of those, 57.89% agreed and 3.51% strongly agreed. At the same time, 38.59% of the participants disagreed, with 36.84% disagreeing and 1.75% strongly disagreeing. The mean rank was 2.6 and the standard deviation was 0.6, which confirms how leaders' views differ regarding the number of formation programmes offered.



Median rank **3.0** | Mean rank **2.6** | Variance **0.3** | Standard deviation **0.6**

Figure 11. Participants' Perception of the Number of Marist Leadership Formation Programmes Offered
Researcher's Source, 2021.

It can be observed that the majority of participants agree that there are sufficient programmes designed to attract and form leaders regarding the Marist charism. The formation of leaders is considered crucial for the vitality of Marist life and mission. Therefore, it could be argued that it is essential for the Institute to offer programmes capable of attracting new leaders, whether internally or externally, and to ensure ongoing leadership formation to optimise the strength of the Marist charism.

Regarding programmes designed to attract and form new leaders, for Wolter *et al.* (2015, 3), available options include the internal development of leaders or recruiting outside the organisational system. The best approach will depend on the type of leadership a given organisation requires. Thus, in the view of this author, "the preferred approach may be driven by the need for homegrown candidates in the unique culture of the organisation versus the need for fresh ideas or expertise that cannot be found within the enterprise" (Wolter *et al.* 2015, 3).

Therefore, the decision to seek internal or external leaders should be based on the perceived need to maintain the current leadership, or on the strategic demand to supply talent that may not yet exist, but that is necessary for the organisation. In this process, care should always be taken to maintain a healthy balance regarding potential leaders' development (Wolter *et al.* 2015, 5). The organic rotation of leaders can be very beneficial to the organisation, helping to foster innovation and an openness to the new realities of

the mission, as well as upholding the continued relevance of the Marist charism in today's world.

In addition to preparing new leaders, it is also essential to support leaders in their fulfilment of the function of providing ongoing formation and upholding the relevance of the Marist charism. According to Bayona (2016, 1), "ongoing formation is above all to help the person believe more in oneself, to believe more in life, to believe more in community and the Church, and to believe more in Christ. This demands a conversion to a new learning attitude in Religious Life".

For Marcellin Champagnat, the ongoing formation of leaders has always been a priority:

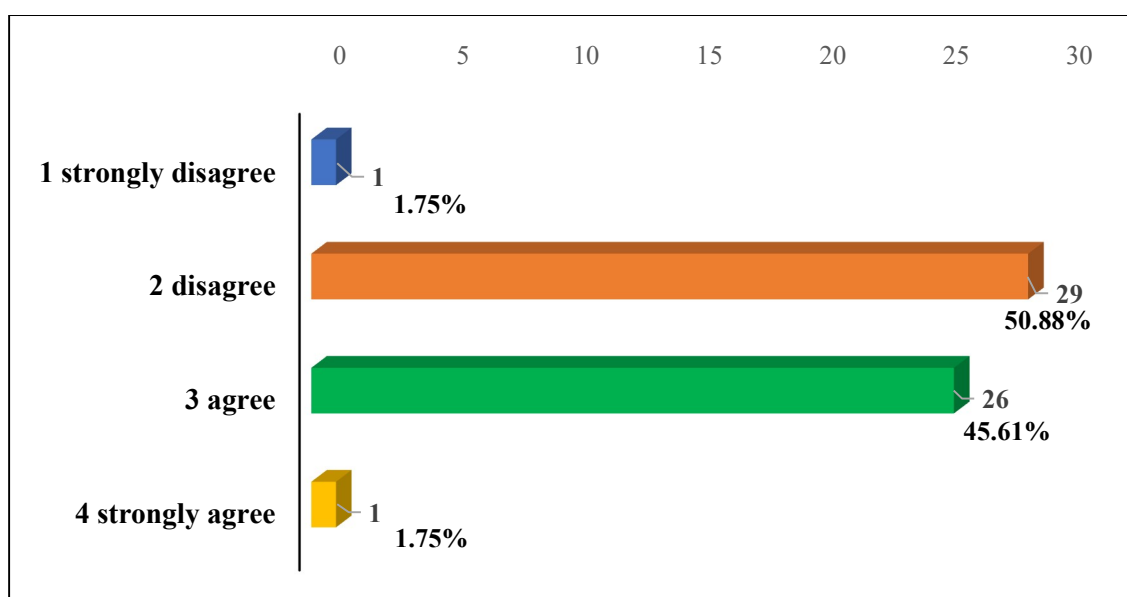
Marcellin developed a system of ongoing professional development which involved both theory and practical experience and was community-based. Especially during the early years, the summer vacations were put to good use for improving his Brothers' store of knowledge and their educational methods through such means as individual and group work, examining committees, and conferences. (The International Marist Education Commission 2007, 25)

In recent years, the Institute has promoted a number of ongoing formation programmes globally and regionally (Institute of the Marist Brothers 2021). These initiatives are designed to attract, form, and accompany Marist leaders, and are directly involved in the mission, leadership, and government at various levels and in various institutional areas of the Institute. While 61.4% of participants agreed that these programmes are sufficient, a significant 38.59% of research participants disagreed with the statement.

The percentage of participants who disagreed indicates that for a relatively large group of leaders in the Institute, formation programmes regarding the Marist charism are insufficient. As such, it could be argued that there is an urgent need to reinforce current programmes of attraction and formation for leaders. In parallel, it is essential to create new formation opportunities so that all Marist leaders have access to the knowledge required to best carry out their mission and respond to their duties in relation to the Marist charism.

6.3.1.2 Current Needs of Brothers and Lay Marists Served by Marist Leadership Formation Processes

Figure 12 reveals participants' perceptions of the statement: "current formation processes respond perfectly to the current needs of the Brothers and lay Marists in ensuring the vitality and continuity of the Marist charism". While 52.63% of participants disagreed with this affirmation, 47.36 % agreed with it. The mean rank of responses was 2.5, with the standard deviation being 0.5, confirming the sentiments of the majority of the participants.



Median rank **2.0** | Mean rank **2.5** | Variance **0.3** | Standard deviation **0.5**

Figure 12. Participants' Perception of the Current Needs of Brothers and Lay Marists Met by Marist Leadership Formation Processes

Researcher's Source, 2021.

The challenge of Marist leadership formation processes is to properly meet the needs of leaders, Brothers and the laity, in order that these parties are able to perform their leadership responsibilities to the best of their respective abilities. To this end, it is very important to equip participants with knowledge of the key elements of the Marist institutional identity and to develop their skills as leaders. This will help formation participants respond better to their responsibilities pertaining to the Marist charism.

According to Gentry *et al.* (2014, 83):

little is known about the extent to which leadership development is actually targeted to the needs of those who go through it. Presumably, the closer the developmental initiative is aligned with the specific developmental needs of leaders, the more effective it should be in yielding desired individual and organizational outcomes.

With this in mind, it becomes evident that an awareness of the expectations and needs of Brothers and laity who undertake Marist leadership formation is very important. In addition, and of equal importance, is tailoring formation processes to participants' specific needs according to their different realities. These vary according to the geographical, cultural, economic, religious and social context of the Marist presence and mission around the world. According to Gentry *et al.* (2014, 84), in order to respond to these needs, it is important "to understand the potential topics and content areas leadership development programs should implement based on the needs of participants who go through such programs".

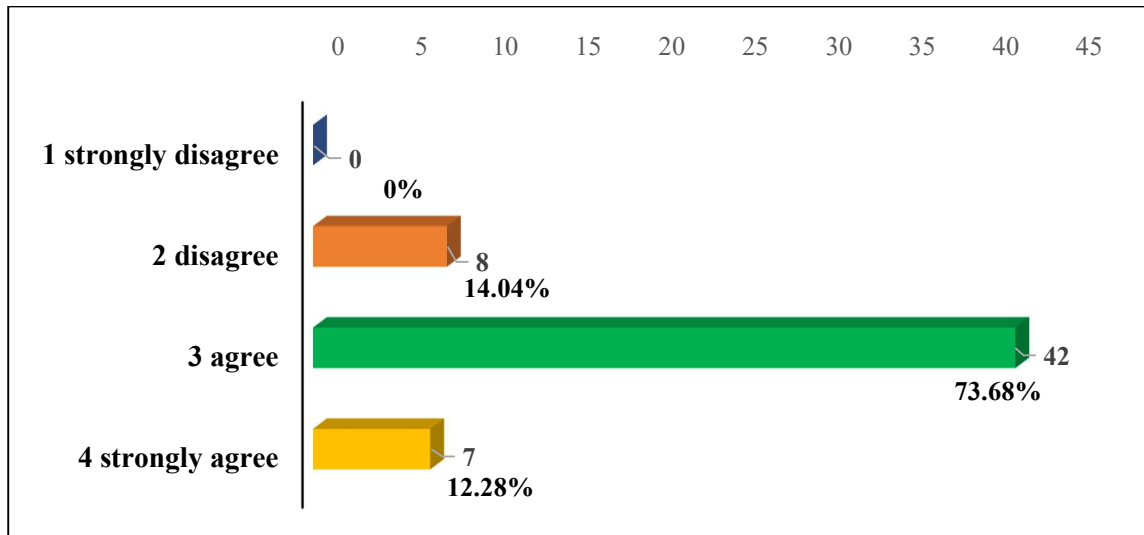
The key reference document for the Marist mission throughout the Institute, entitled *In the Footsteps of Marcellin Champagnat* (2007), reinforces the need for formation processes, especially ongoing formation, to address the holistic development of Marist leaders. To this end, the Institute recognises the need to "prepare Marist leaders through their ongoing formation in pedagogy, educational leadership and management, as well as in spirituality, the evangelisation of youth, justice and solidarity" (The International Marist Education Commission 2007, 32).

In conclusion, it could be argued that three key factors motivate the high percentage of disagreement regarding current formation processes and whether they adequately respond to the current needs of Brothers and lay Marists to maintain vitality and ensure the continuity of the Marist charism. First, current formation programmes for Marist leaders do not sufficiently address participants' expectations and specific needs arising from their diverse contexts and missions. The second reason may be due to the lack of programmes with systematic processes for formation, accompaniment, evaluation, and certification. As can be seen from the description in the archives of the Institute of the Marist Brothers (2021), current programmes are sporadic in frequency and do not offer leaders a process of continuous accompaniment. The vast majority of these programmes are updated in line with the Marist vocational experience, which is directed towards Brothers and laity. Leaders may feel uncomfortable in answering this question in the affirmative due to formation programmes' lack of linearity and comprehensiveness. Similarly, an absence of ongoing accompaniment and certification, and the sense of a career that is built up through academic formation, may be contributing factors.

Finally, for the most part, leaders responsible for the government and mission of the Institute participate in events that are part of their work agenda at the global or regional level. These represent unique opportunities for exchange, learning, and knowledge about the Marist world, however, they are not part of an official leadership formation programme. As such, they cannot fully meet the needs of leaders in the exercise of their mission.

6.3.1.3 Contribution of Formation Programmes to Creating a Vision of Vitality and Continuity of the Charism

Figure 13 shows participants' perception of whether current programmes and formation processes are helping to create a vision for the future vitality and continuity of the Marist charism. It is noted that the high rate of 85.96% of participants agreed that current formation programmes contribute to creating a vision for the future of the Marist charism. 14.04% of participants disagreed with the statement. The mean rank was 3.0 while the standard deviation was 0.5 with 0.3 of variance.



Median rank **3.0** | Mean rank **3.0** | Variance **0.3** | Standard deviation **0.5**

Figure 13. Participants' Perception of the Contribution of Formation Programmes to Create a Vision for the Future Vitality and Continuity of the Charism
Researcher's Source, 2021.

For Collins and Porras (1996, 66), vision consists of two essential elements, namely a central ideology and a vision for the future where core values serve as guiding

principles. According to these authors, a central ideology defines what is to be defended and why it exists, so it is immutable and complements a perceived ideal future. The perceived ideal future can be defined as that which one aspires to achieve and create, which is therefore something that will require significant changes and progress in order to realise it.

The Institute seeks to ensure a vision of vitality and continuity for the Marist charism through leadership formation programmes and processes, which are based on its philosophy, principles, values, and vision for the future. This requires constant adaptation to the movements and changes occurring in the contemporary world, so as to leave behind any elements that no longer make sense and carve out a new reality for the Institute on the basis of its vital structuring elements and present reality.

Thus, it could be concluded that the high percentage of agreement with the aforementioned statement could be associated with two factors. First, an appreciation of the quality of formation initiatives promoted by the Institute, which guarantee the essential elements of the Institute's identity in a manner that is appropriate to its present context. Second, a horizontal and participatory style of government that the Institute is gradually implementing and strengthening across all organisational layers. This enables the Institute to perceive itself in a new way and to construct a vision for the future that is based on the contemporary challenges and opportunities that continue to present themselves (Institute of the Marist Brothers 2021).

Regarding those who disagreed with the statement, though far less in number than those in agreement, it remains clear that the Institute must further reinforce its vision for the Marist charism through formation programmes for leaders. This journey must be taken up as a permanent challenge, and one which—if properly taken advantage of—can renew and revitalise the Marist life and mission.

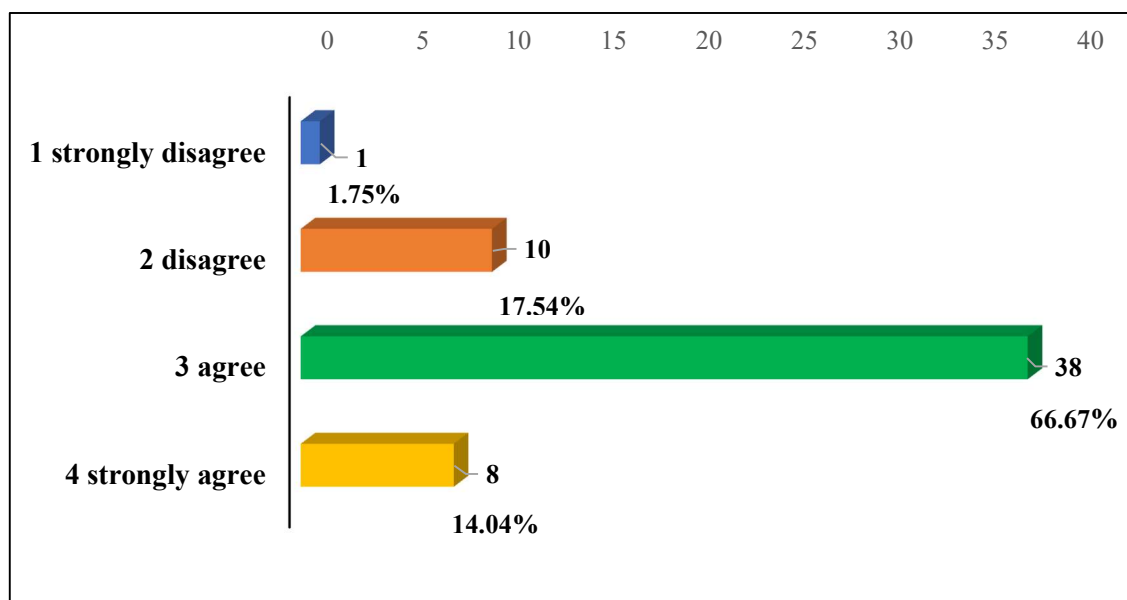
To conclude the analysis of this first category, which deals with formation programmes for Marist leaders, the numbers show that for the majority (61.4%) of AU Marist Leaders, Marist leadership formation programmes are sufficient. However, for 52.63% of respondents, the current formation programmes do not adequately cater to the current needs of Brothers and lay Marists in their mission of maintaining the vitality and ensuring the continuity of the Marist charism. Finally, for a large majority of the participants, 86% of the current programmes and formation processes are contributing to creating a vision for the future vitality and continuity of the Marist charism.

6.3.2 Knowledge of the Marist Charism

The second category addressed Marist leaders' *knowledge of the Marist charism*. The objective was to analyse three subcategories related to the Marist charism in Marist leadership formation programmes. The first subcategory questions whether current Marist formation programmes ensure a comprehensive knowledge of the charism. The second subcategory asks whether all lay Marists have an in-depth knowledge of the charism. Finally, the third subcategory evaluated whether the Marist charism is well known among all those who work directly towards the Marist mission.

6.3.2.1 Knowledge of the Marist Charism Assured by Present Formation Programmes

Figure 14 shows that Administrative Unit Marist Leaders have an overwhelmingly positive perception of the knowledge provided by formation programmes regarding the Marist charism. When asked whether current formation programmes guarantee a profound knowledge of the Marist charism, 80.71% of participants agreed and 19.29% disagreed. The mean rank was 2.9 and the standard variation 0.6, contributing 3.0 as median rank.



Median rank **3** | Mean rank **2.9** | Variance **0.4** | Standard deviation **0.6**

Figure 14. Participants' Perception of the Knowledge of the Marist Charism Provided by Present Formation Programmes

Researcher's Source, 2021.

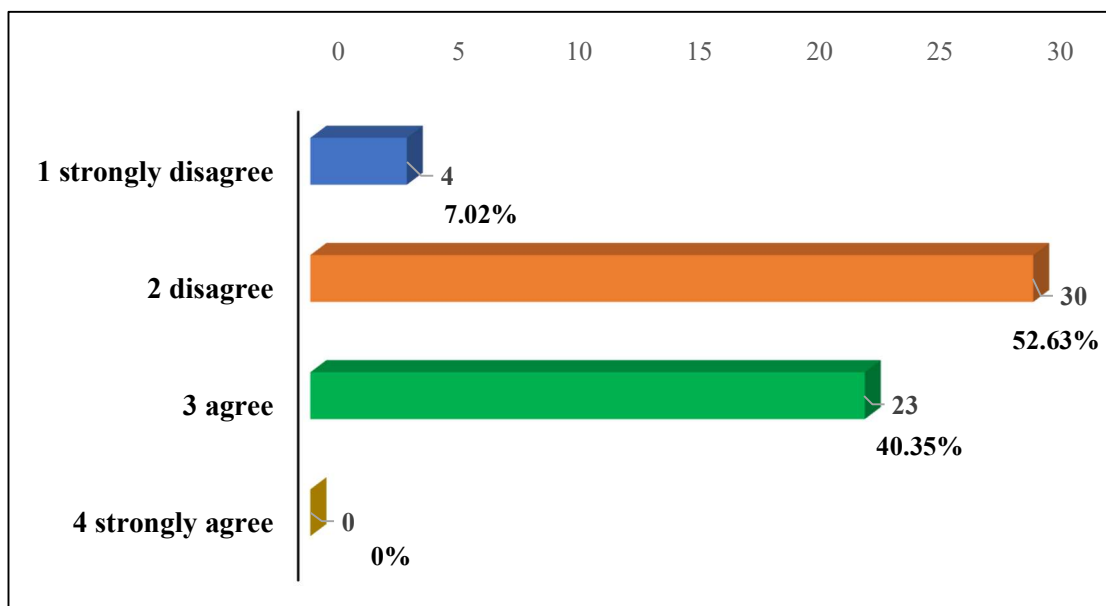
Formation is the ideal way to ensure leaders are prepared with in-depth knowledge of the charism and are capable of working towards its perpetuity. For this reason, the document *In the Footsteps of Marcellin Champagnat* (The International Marist Education Commission 2007, 32) states that Marist leaders at provincial and regional levels should use Marist formation programmes to foster the evolution of the Marist identity. These programmes should bring together Brothers and laypeople, encourage retreats and publications, focusing especially on Marcellin Champagnat, his educational heritage, spirituality, and charism.

For Lydon (2011, 79), high expectations regarding knowledge and commitment to the charism, especially when it comes to leaders, must be accompanied proportionately by significant levels of support. In this regard, it is imperative that formation programmes meet the needs of the Institute in forming leaders who are knowledgeable and committed to the future of the Marist charism. This challenge of formation and commitment requires a new mentality for both Brothers and laity so that together they can commit themselves as leaders to the vitality and continuity of the Marist charism, dispensing with anything that may hinder the realisation of this vision.

As such, it could be concluded that research participants' considerable concurrence regarding present formation programmes' capacity to guarantee a deep knowledge of the Marist charism indeed demonstrates the Institute's efforts to reflect on the central elements of the Marist charism (mission, spirituality and fraternity) in global and local forums. It should be emphasised that most formation programmes for Brothers and laity are focused on the Marist vocation. It is important to note however that 19.29% of the participants did disagree with the statement, and that therefore a considerable percentage of leaders remain unsatisfied with formation programmes regarding the charism.

6.3.2.2 Lay Marists' Knowledge of the Marist Charism

Figure 15 features Marist leaders' responses to the statement: "all lay Marists have a profound knowledge of the Marist charism". A high percentage of 59.65% of research participants disagreed with this statement. The percentage of those who agreed with the statement was 40.35%. The median rank for the participants' responses was 2.0, with the mean rank being 2.3, as a variance of 0.4 and resulting in a standard variation of 0.6.



Median rank **2.0** | Mean rank **2.3** | Variance **0.4** | Standard deviation **0.6**

Figure 15. Participants' Perception of Lay Marists' Knowledge of the Marist Charism
Researcher's Source, 2021.

As already described in Chapter One, lay Marists include all those who feel attracted to commit themselves more deeply to the Marist charism.

The Constitutions and Statutes of the Marist Brothers affirm that both Brothers and lay Marists can be depositaries of the charism of the Founder (2020a, 20). On the basis of this affirmation, one can say that the Marist charism is a gift of the Holy Spirit to the Church in its entirety. Therefore, the Marist Brothers are not the only heirs of the charism. It is in this context that the laity find their place and role in the charism.

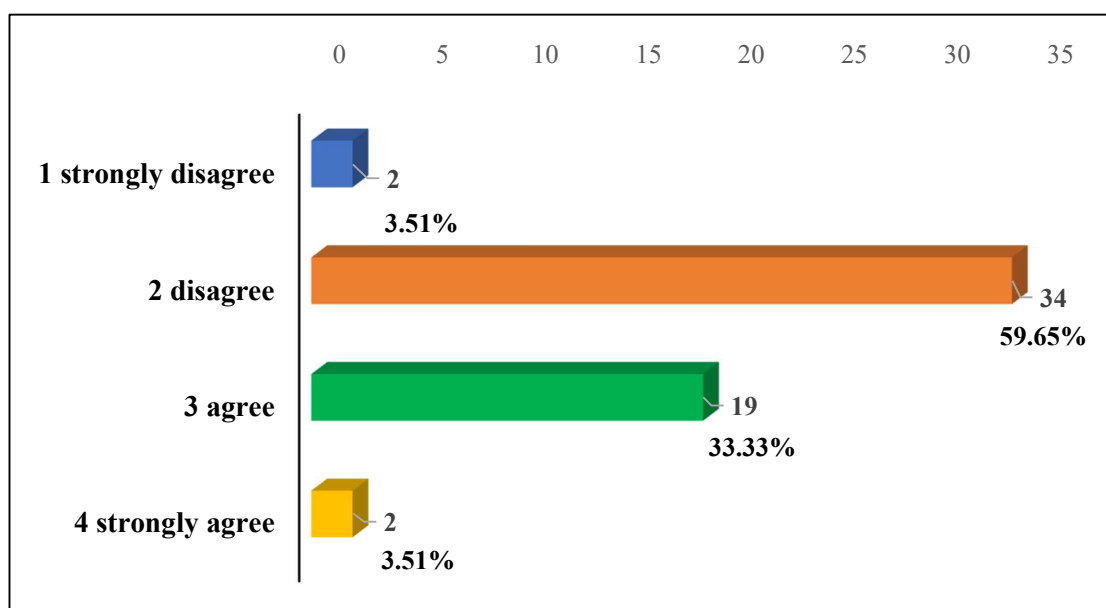
Furthermore, according to the same document (2020a, 41), in order to ensure knowledge of, commitment to, and the ability to fully live the charism, the Institute promotes joint formation experiences for Brothers and laity. These experiences strengthen their bonds of communion, their capacity to share together in the vitality of Marcellin Champagnat's charism and enable them to deepen their common Christian vocation and specific identities together. In this way, the Institute is committed to making sure the laity, on an equal footing with the Brothers, have full access to the history and spirituality of the Marist charism, as well as a mutual trust and common commitment to it (The International Marist Education Commission 2007, 29).

Thus, the high rate of disagreement with the aforementioned statement is a significant source of concern. Lay Marists, along with the Marist Brothers, could be considered the Institute's closest group, committed as they are to the experience and

living of the Marist charism. The result shows that there is no clear and consensual understanding of the lay vocation and its recognition within the Institute. Even if a portion of the Marist laity is included in formation initiatives, there are realities in the Marist world that are not yet being adequately addressed. This would justify the percentage that only 40.35% of research participants agreed that the laity's knowledge of the Marist charism is sufficient.

6.3.3.3 Knowledge of the Marist Charism on the Part of Collaborators Engaged in the Mission

Figure 16 analyses the perception of Administrative Unit Marist Leaders regarding whether the Marist charism is well known among all collaborators who work directly with the Marist mission. It can be seen that a high rate of 63.16% of research participants did not agree with the statement. Of that figure, 3.51% strongly disagreed. The percentage of those who agreed with the affirmation was only 36.84% of participants. The mean rank was 2.4, with a variance of 0.4 and standard deviation of 0.6.



Median rank **3.0** | Mean rank **2.4** | Variance **0.4** | Standard deviation **0.6**

Figure 16. Participants' Perception of the Knowledge of the Marist Charism Among All Collaborators of the Marist Mission

Researcher's Source, 2021.

According to O’Leary *et al.* (2012, S70), the term “collaboration” is widely used around the world across all sectors (public, private and non-profit) and can be understood as a process designed to facilitate multi-organisational arrangements in dealing with conflict resolution.

For the Institute, the term defines all persons who in one way or another contribute to the Marist mission and who are consequently referred to as “collaborators” (Setor de Pastoral 2012, 128). This term thus includes all lay teachers, non-teaching professionals, health professionals, and others, corresponding to almost 70,000 people within the Institute (Institute of the Marist Brothers 2021).

In this regard, Article 88 of the Constitutions and Statutes of the Institute of the Marist Brothers states that:

we share our spirituality and our educational approach with parents, lay teachers, and other members of the educating community. By the service they render, the non-teaching staff collaborate closely in our apostolic task. We show our pupils that we are not only their teachers, but also their brothers. (Marist Brothers of the Schools 2011, 76)

The reasons to disagree with the aforementioned extract may lie in several factors. One could be the Institute’s lack of programmes and formation processes, especially in the area of the mission, where the vast majority of Marist collaborators work. Another factor could be the absence of institutional policies and formation processes regarding Marist identity and the charism. The latter can guarantee proper capillarity of the knowledge and experience surrounding the charism, as well as across the various segments of the Marist life and mission. Current formation programmes are still restricted to a very select group of people within Marist initiatives, however. This factor is corroborated by the low percentage of 36.84% of research participants who agreed that collaborators have a good knowledge of the charism. Another factor could also be collaborators’ lack of commitment to actively seek out knowledge regarding the Marist charism. This could be due to a range of issues regarding collaborators’ engagement with the Marist mission, such as: livelihood, promotion, or a limited period working in the institution, among others.

Finally, another factor could be linked to the absence of a charismatic reference community for educational centres, which could assure the presence, visibility and knowledge of the charism. In the vision of the Provincia Marista de Ibérica (2015, 11), “a Marist Christian community of reference is formed by a group of Marists (Brothers and laity) who position themselves as a recognised community, and whose mission is to

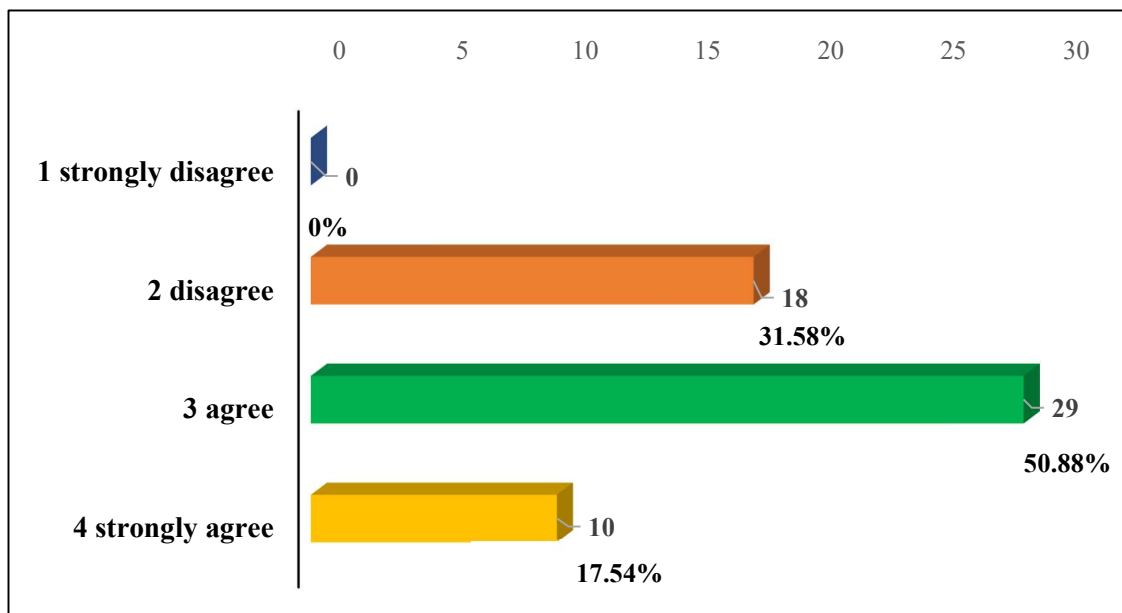
make the charism of Marcellin Champagnat present in the Institution's educational work".

The Institution's current vocational crisis may be further exacerbated by the absence and/or fragility of formations and experiences, which are designed to deepen participants' knowledge of Marist values and principles and delivered in the context of the Marist mission. Similarly, this fragility can lead to a loss of identity for Marist educational centres, rendering them simply educational businesses, among other assorted consequences. Therefore, the need for the Institute to contemplate a proper formation for leaders, which can contribute to the spread of the charism across all its spheres of presence and action becomes ever more pressing.

To conclude the analysis of this category on knowledge of the Marist charism, we can affirm that the Institute faces a great challenge in ensuring leaders' deepened knowledge of the Marist charism, and that of all Marist mission collaborators. Although 80.71% of research participants affirmed that Marist formation programmes guarantee a deepened knowledge of the charism, a gap exists between this positive perception and participants' vision of how well the laity and Marist collaborators know the charism. The results of Figure 10 reveal that only 40.35% of the participants agreed that lay Marists have a deep knowledge of the charism. This percentage is even lower—only 36.84%—as presented in Figure 11, when it comes to all other collaborators working directly with the Marist mission and their knowledge of the charism.

6.3.4 Knowledge of the Marcellin Champagnat's Impact on the Marist Mission

Figure 17 presents Administrative Unit Marist Leaders' perception of whether Marcellin Champagnat's impact on the Marist Mission is well known by all those involved. It can be noted that the response was relatively positive, with 68.42% of research participants agreeing that all involved in the Marist mission have proper knowledge of Marcellin Champagnat's impact. Of that total, 17.54% agreed strongly and 50.88% agreed. The percentage of those who disagreed was 31.58%, with no one disagreeing strongly. The median rank was 3.0, with a mean rank of 2.9, with a variance of 0.5. With this, the standard deviation was 0.7.



Median rank **3.0** | Mean rank **2.9** | Variance **0.5** | Standard deviation **0.7**

Figure 17. Participants' Perception of the General Recognition of Marcellin Champagnat's Impact on the Marist Mission

Researcher's Source, 2021.

Several studies have been published on Marcellin Champagnat and his writings, including testimonies from Brothers who lived with him. An important such testimony is that of Brother Jean-Baptiste Furet, one of Marcellin Champagnat's first biographers, which highlights Marcellin Champagnat's charismatic leadership in spite of his circumstances, as well as his entrepreneurial stance with his Brothers, communities and the mission (1989, 61).

According to Klein and House, the relationship between Marcellin Champagnat's charismatic leadership, the charisma itself, the environment in which the first Brothers lived, and Marcellin Champagnat's consequent impact on the mission, could be better appreciated. These scholars affirm that "charism resides in the relationship between a leader who has charismatic qualities and those of his or her followers who are open to charism, within a charisma-conducive environment" (1995, 183).

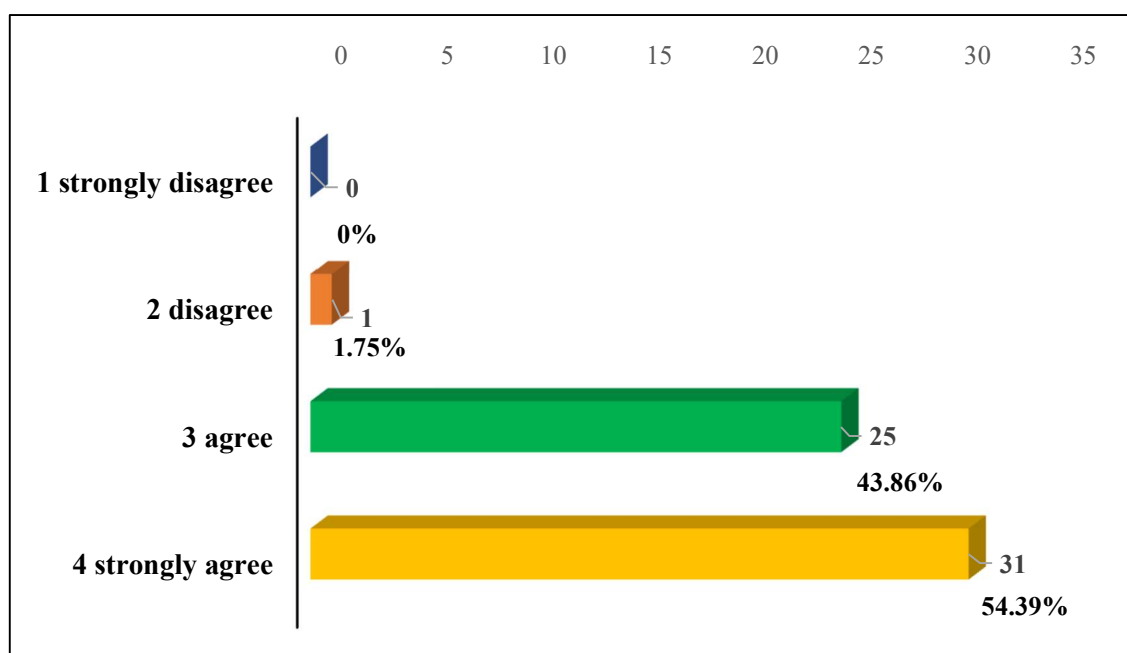
Providing such knowledge of Marcellin Champagnat's legacy has the objective of ensuring the formation of leaders who can identify with him and his followers, and who also feel collectively committed to carrying the charism forward. For Parry *et al.* (2019, 400), followers develop social identification when they identify not only with the leader himself, but also with the group following the leader. Along the same lines, Kark, Shamir

and Chen (2003, 249) affirm that “it is the social identification with the group of followers that engenders feelings of belonging, as opposed to personal identification between individual leader and follower”.

Thus, it is concluded that the agreement rate of 68.42% for this category among research participants is relatively high and positive. Knowledge of Marcellin Champagnat and his intuitions for the Institute are essential for reinterpreting the Marist charism in the contemporary world, and for guaranteeing followers that are committed to the future of the Marist charism and mission. At the same time, knowledge of Marcellin Champagnat leads to a better appreciation and understanding of the Marist charism itself.

6.3.5 Commitment of the Current General Council to the Formation of Collaborative Leadership

Administrative Unit Marist Leaders’ perception regarding the current Institute of the Marist Brothers General Council’s commitment to developing collaborative leadership has been extremely positive. This can be seen in Figure 18.



Median rank **4.0** | Mean rank **3.5** | Variance **0.3** | Standard deviation **0.5**

Figure 18. Participants’ Perception of the Current General Council's Commitment to Collaborative Leadership

Researcher’s Source, 2021.

Among participants, 98.25% agreed with the statement affirming the General Council's commitment. Of that number, 54.39% agreed strongly and 43.86% agreed. Only 1.75% did not agree. This shows great recognition for the collaborative leadership style being fostered by the Institute. The median rank was 4.0, with the mean rank 3.5. The variance was 0.3 with a standard deviation of 0.5, demonstrating that the General Council's efforts in leadership formation are well regarded and recognised.

According to Lowe (2011, 319), collaboration is a force that favours alternative leadership practices and visions. It requires paradigm shifts in leadership understanding, moving from leadership focused on the personal attributes or characteristics of a leader to leadership focused on others. Among the main characteristics of effective collaborative leadership is the ability to guide and facilitate the mission of a group in collaboration with others (Lowe 2011, 319). In this sense, Chrislip and Larson (1994) define "collaborative leadership as an ability to articulate a vision and inspire subordinates to share in and enact that vision".

The 22nd General Chapter (2017) of the Institute asked the current General Council to "continue the processes of regionalisation and promotion of inter-regional collaboration to build a Global Body with structures, processes and strategies that are agile, simple, and participative". Responding to this guideline issued by the General Chapter, the Strategic Plan of the General Administration 2017-2025 (Institute of the Marist Brothers, 2019) deals with formation and the transversal development of a style of collaborative leadership across all projects.

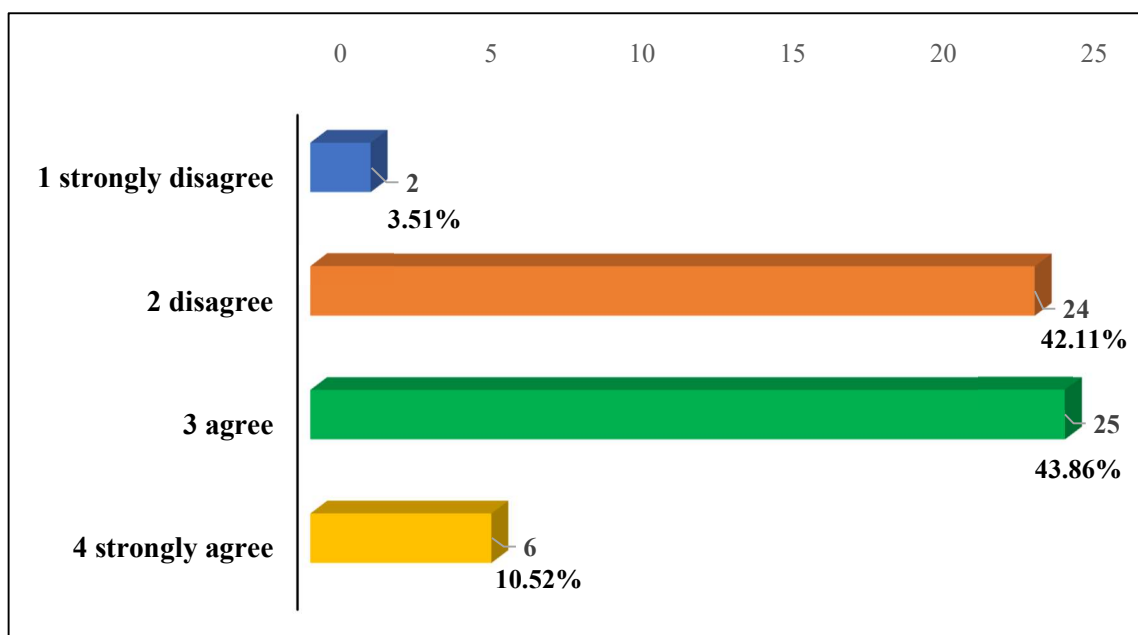
For this reason, two main reasons can be singled out as contributing to the overwhelmingly positive perception of the current General Council's commitment to the development of collaborative leadership. The first involves the ongoing processes and initiatives pertaining to leadership, management and government, and which focus on collaborative, close and participatory leadership. The second reason can be attributed to institutional communication processes, which favour the development of a global charismatic family conscience. At the basis of these processes and initiatives is a collaborative leadership style, which is being developed across all segments and layers of the Institute. The General Council's challenge is therefore to continue and strengthen their current path.

6.3.6 Co-responsibility of Brothers and Laity in the Marist Life and Mission

Finally, the fifth and final category provides an analysis of Administrative Unit Marist Leaders' perception of the co-responsibility of Brothers and laity in the Marist life and mission.

6.3.6.1 Co-responsibility of Brothers and Laity in Marist Life

As shown in Figure 19, 54.38% of research participants agreed with the statement that there is a high level of co-responsibility between Brothers and laity in Marist life. Of this total, 10.52% agreed strongly and 43.86% agreed. The percentage of those who did not agree was also relatively high, with 45.62% of participants, and of that total, 42.11% disagreed and 3.51% strongly disagreed. The median rank of participants in relation to the statement was 3.0 with the mean rank of 2.6. The variance was 0.5 resulting in a standard deviation of 0.7.



Median rank **3.0** | Mean rank **2.6** | Variance **0.5** | Standard deviation **0.7**

Figure 19. Participants' Perception of the Level of Co-responsibility of Brothers and Laity in Marist Life
Researcher's Source, 2021.

For the purposes of the research project, elements such as spirituality, community life and charismatic formation were considered regarding Marist life. Both Brothers and

the laity are expected to welcome the challenge of mutually enriching the Marist vocation (religious and lay), considering both common and specific elements. Brothers and laypeople recognise themselves as one global charismatic family, taking collective responsibility for Marist life.

Regarding Marist Brothers' openness to sharing responsibility for Marist life, the Constitutions and Statutes of the Institute of the Marist Brothers state that:

within this charismatic family, we Brothers willingly contribute the richness of our consecrated lives by building communion, providing accompaniment, sharing our spirituality and community life, participating in joint formation and solidarity works, and promoting co-responsibility for Marist life and mission. (2020a, C.6)

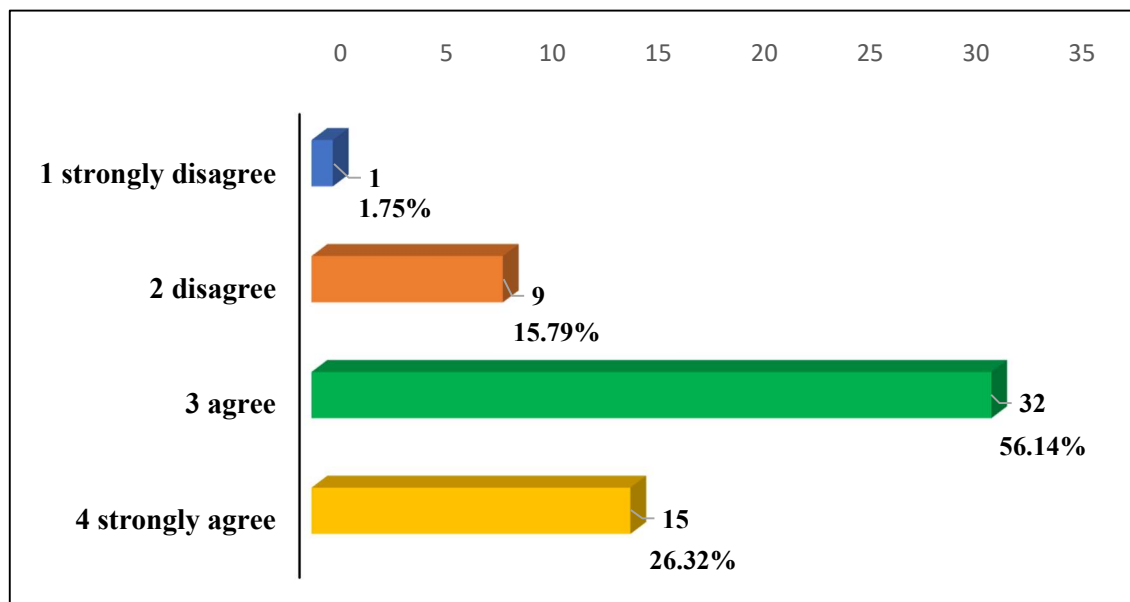
Likewise, the reference document for lay Marists, *Gathered Around the Same Table*, says that “lay Marist communities are offering a renewed map of Marist life, a reference point for the charism that can endow new energy in the mission, although at this time the number of Brothers is diminishing” (International Editorial Commission, 2009, 65). Seeking to ensure the co-responsibility of Brothers and laity for the Marist life and mission, the 22nd General Chapter (2017) called for “all levels of government to establish and/or strengthen structures for all Marists to share leadership and responsibility for Marist life and mission”.

Therefore, it was noted that despite the efforts and journey undertaken by the Institute, only a little over 50% of participants agreed that there is a high level of co-responsibility of Brothers and laity for Marist life. The result may reflect Marist Brothers communities' minimal openness to the Marist laity. Similarly, there are limited experiences and spaces in which these parties can share spirituality, knowledge and experiences of the charism, as well as joint responses for promoting the Marist vocation, both consecrated and lay.

6.3.6.2 *Co-responsibility of Brothers and Laity in the Marist Mission*

In Figure 20, the co-responsibility of Brothers and laity was analysed from the perspective of the Marist mission. The statement presented to the participants of the research project was thus: “there is a high level of co-responsibility of Brothers and laity in the Marist mission (evangelisation and education of children and young people)”. The number of affirmative replies was extremely high. Of the total number of participants, 82.46% agreed with the statement. Of this total, 26.32% agreed strongly and 56.14%

responded that they agreed. Of the 17.54% who disagreed, 15.79% disagreed and 1.75% strongly disagreed. The median rank of participants in relation to the statement was 3.0 with the mean rank of 3.1, with the variance being 0.5 with a standard deviation of 0.7.



Median rank **3.0** | Mean rank **3.1** | Variance **0.5** | Standard deviation **0.7**

Figure 20. Participants' Perception of the Level of Co-responsibility of Brothers and Laity in the Marist Mission

Researcher's Source, 2021.

With regard to co-responsibility for mission, Brothers and laity are invited to demonstrate willingness to take on necessary tasks according to their respective capacities and life situations, assuming them as a service to children, young people and the charism. According to the document *Gathered Around the Same Table*, "all of us Marists have co-responsibility for responding to this shared mission, in our different tasks. Together, we want to discern, plan and carry out what God requests of us" (International Editorial Commission 2009, 40). In this way, the laity not only carry out but also participate in planning and decision-making by collectively responding with creativity and audacity to the needs of the Marist mission.

Research participants' perceptions indicate that there is a great degree of co-responsibility shared between Brothers and laity regarding the Marist mission. Results show that the Marist mission itself, by its very nature and openness, provides a greater opportunity for co-responsibility. The results also reflect the reality of the Institute, whereby Brothers are fairly small in number and their average age relatively advanced.

As a consequence, the laity represent more than 95% of the agents of the Marist mission working directly with children and young people, as well as in the Marist mission's spheres of management and government (Institute of the Marist Brothers 2021).

To conclude the analysis of this category, it is possible to say that Figures 15 and 16 show a significant difference in research participants' perception of the co-responsibility of Brothers and laity with regard to the Marist life and mission. While 82.46% of participants agreed with the statement that there is a high degree of co-responsibility between Brothers and laity for the Marist mission, only 54.38% agreed when asked more specifically about Marist life.

6.4 MARIST LEADERS' UNDERSTAND OF GLOBAL, PROPHETIC AND COLLABORATIVE LEADERSHIP

In this third section, the objective is to present how Marist leaders of the Administrative Units understand global, prophetic and collaborative leadership. The question was: what do you understand by a "global prophetic and collaborative leadership"? In order to improve comprehension of this phenomenon, three categories will be analysed: *global leadership*, *prophetic leadership* and *collaborative leadership*.

Considering that research participants were from 23 different countries within the six Marist Regions, it is important to consider that their understanding or definition of the concept of leadership may have been subject to cultural influences. For Heck (1996, 75), "some leadership concepts may be common to several cultures, while others may be more culturally specific". According to this author, this is because cultural contexts may influence people's attitudes, values, principles and norms of behaviour, and that these can be differ greatly between one place and another (Heck 1996, 76).

However, potential cultural influences are not necessarily a norm. According to Huber (2004) and Møller and Schratz (2008) (*apud* Easley and Tulowitzki 2013, 746), studies comparing the formation of leaders in international contexts have revealed similarities and paradoxes between conceptualisations, approaches and challenges to leadership programmes. Thus, although participants present great cultural diversity, it is not the intention of this research to make a comparative analysis of different cultural realities' understandings of leadership. The research seeks rather to identify and value present and recurrent elements in participants' responses that can contribute to a more

comprehensive view of how Marist leaders understand global, prophetic and collaborative leadership.

6.4.1 Global Leadership

The first category analysed was that of *global leadership*. Of the 57 participants, 27 expressed their understanding of global leadership (Figure 21), which consisted of four main sub-categories: global vision (11 participants), in tune with the world (seven participants), transcending borders (seven participants) and commitment to the charism (two participants).

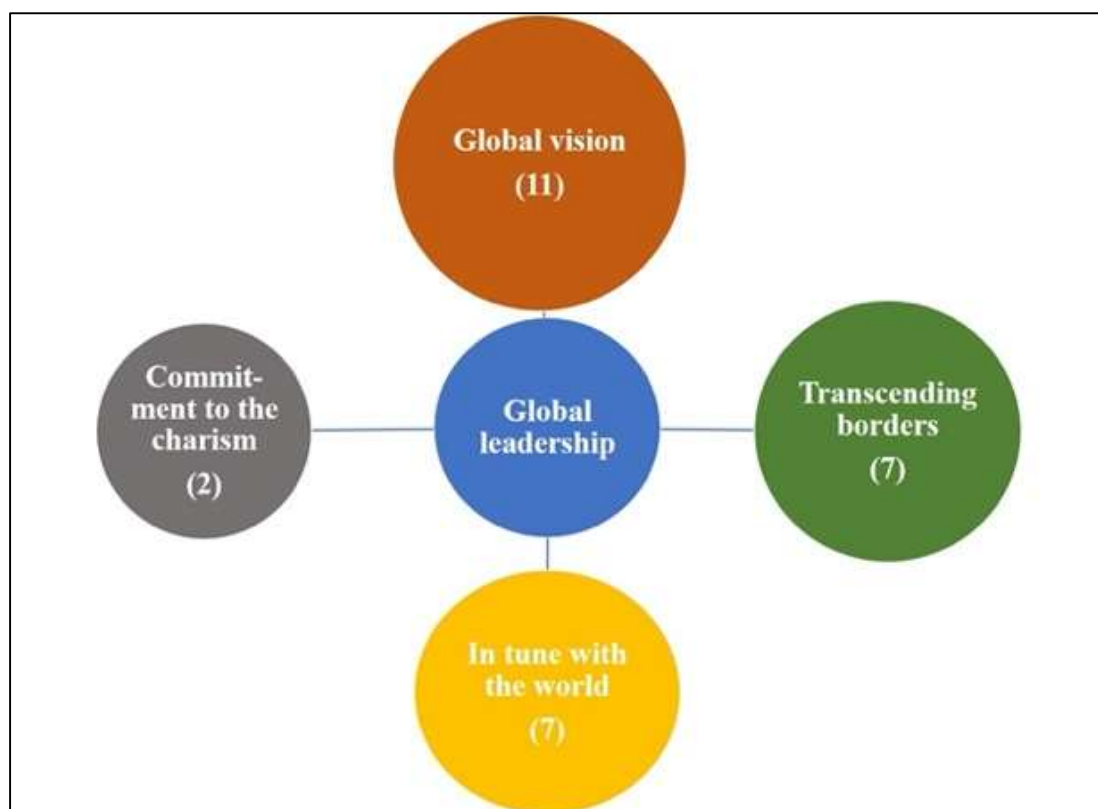


Figure 21. Understanding of Global Leadership

Researcher's Source, 2021.

One participant pointed out that global leaders were “those that touch the global reality” (AU Marist Leader 15). Corroborating this thought, McCall and Hollenbeck (2002, 32) state that global leaders “are those who do global work”. These authors consider that leaders and the positions they hold are more or less global depending on their roles, their responsibilities and duties, as well as the extent to which they cross

borders. The definition is based entirely on the type of action and work undertaken by a given global leader, and which distinguishes them from a domestic leader.

For Haque *et al.* (2017, 13), “domestic leaders operate within home boundaries whereas global leaders are boundaryless (globally)”. There is thus a small differentiation between how global and domestic leaders are conceptualised. For Qureshi (2013, 9) “some of the key features that have drawn this thin line include: cultural awareness, competencies, approach to performing tasks, and mindset respectively”. Thus, Haque *et al.* (2017, 13) state that “the level of complexity is a reason that differentiates global leaders from domestic leaders in organisational settings”.

However, other research participants understood that global leadership went beyond the concept of their global or domestic performance. For AU Marist Leader 33, a global leader was someone “in the line of an international Marist family, beyond our frontiers, prophetic, following in our task of making Jesus Christ known and loved, responding to emerging needs”. In the same vein, Beechler and Javidan (2007) define global leadership thus:

global leadership is the process of influencing individuals, groups, and organisations (inside and outside the boundaries of the global organisation) representing diverse cultural/political/institutional systems to contribute towards the achievement of the global organisation’s goals. (2007, 140)

On the basis of these conceptualisations, two types of global leadership can be identified from the participants’ perspectives. The first is by virtue of leaders’ global actions themselves, and the second is related to how leaders’ thoughts and actions can create global impact, all within the borders of their respective countries or Administrative Units.

The four sub-categories identified in research participants’ understanding as relevant to global leadership will now be presented.

a. Global Vision

The first subcategory—affirmed by 11 participants—was *global vision*. According to AU Marist Leader 11, “global leadership includes a broad vision of the complexity, dynamism and interconnectivity of reality”. The vision of a clearer future on the horizon and a greater understanding of reality is essential for institutions and individuals to guide themselves when responding to their mission.

In this sense, global leaders necessarily contribute to developing a global vision that cuts across all institutional levels and gives meaning and inspiration to members' work. These leaders' experiences and actions provide them with the appropriate conditions to build a broader view of social trends and complexities. This is why Adler (1997, 176) states that "within this emerging cross-cultural interactive context, global leaders must articulate a vision which, in and of itself, is global; that is, global leaders articulate the meaning within which others from around the world work and live".

Complementing this idea, AU Marist Leader 43 stated that global leaders "are vision makers and work alongside others". According to this participant, building a global vision is just one of global leaders' challenges. Another very important challenge is to articulate and communicate this vision in a way that inspires others to commit to its realisation. Along these lines, Adler (1997, 176) says that "beyond having a worthy vision, global leaders must be able to communicate their vision in a compelling manner to people from around the world".

It is clear from the above that global leaders serve as creators and disseminators of a global vision that can benefit both organisations and their members in the fulfilment of their mission.

b. In tune with the world

In tune with the world was the second subcategory related to global leadership and was identified by seven participants. For AU Marist Leader 23, it was seen as imperative for global leaders "to have an open view of reality, to allow oneself to be challenged by it and be capable of generating attractive and audacious responses". Therefore, it is essential for leaders to be attuned to the realities of the world, for them to be aware of, and respond to, the contemporary challenges and needs related to society, nature and especially children and young people.

Confirming the words of this participant, Pope Francis states that:

theological and philosophical reflections on the situation of humanity and the world can sound tiresome and abstract, unless they are grounded in a fresh analysis of our present situation, which is in many ways unprecedented in the history of humanity. (2015, n. 17)

Similarly, the document *Compendium of the Social Doctrine of the Church* stresses that the capacity to recognise the equal dignity of each individual and of all peoples corresponds directly to the awareness that human dignity can only be assured and

promoted in a communal way by humanity as a whole (Pontifical Council for Justice and Peace 2004, n. 145). For this to happen, global leaders must have the capacity to interpret the realities of the world and help organisations and their members to be attuned to these realities, contributing to their improvement for the common good for all.

c. Transcending Borders

The third subcategory was that of *transcending borders*, identified by seven participants. According to AU Marist Leader 39, “partnerships and the crossing of national and cultural boundaries” is specific to global leaders. In the same vein, AU Marist Leader 40 stated that global leadership was “focussed on international and intercultural contexts”. It is clear from research participants’ perspectives that an essential part of global leaders’ development and performance is the cultural element, as it has a determining influence on leaders’ behaviour and on how they overcome certain types of borders. According to Hofstede (2001), people from different cultures think and act differently due to their understanding of appropriate behaviours. Similarly, their culture of origin influences how they react differently to organisational structures.

Paige and Mestenhauser note the international identity of organisations and their leaders’ scope of international action is also along these lines. For them, internationalisation is “a complex, multidimensional learning process that includes the integrative, intercultural, interdisciplinary and comparative transfer of knowledge-technology, contextual and global dimensions of knowledge construction” (1999, 504).

For AU Marist Leader 55, the understanding of borders went beyond the cultural concept. In this participant’s vision, a global leader must have the ability to “listen deeply across race, gender, culture, religion and geographical location”. Pope Francis, in his Encyclical Letter *Fratelli Tutti*, presents St Francis of Assisi as an example of a leader capable of overcoming borders. For the Pope, St Francis “shows his openness of heart, which knew no bounds and transcended differences of origin, nationality, colour or religion. . . . Francis’ fidelity to his Lord was commensurate with his love for his brothers and sisters” (2020b, n. 3).

A constant challenge for Marist leaders is transcending boundaries that are cultural, religious, economic, social, local, ethnic, gender and those relating to academic background, among others. In light of the Institute’s presence in 79 countries and the most varied realities, and in order that the Institute properly recognise itself as a global

charismatic family at the service of an evangelising and educational mission in all contexts where children and young people exist, the development of this particular element of Marist leadership becomes essential.

d. Commitment to the Charism

The fourth subcategory characterising global leadership was *commitment to the charism*, as expressed by two participants. AU Marist Leader 16 said that to be able to exercise and be recognised as a global leader within the Institute, it was essential to “know the charism, to live it and transmit it”. This thought is in perfect harmony with Pope Francis’ guidance. In *The Joy of the Gospel*, Pope Francis (2013, n. 130) states that:

the Holy Spirit also enriches the entire evangelising Church with different charisms. These gifts are meant to renew and build up the Church. They are not an inheritance, safely secured and entrusted to a small group for safekeeping; rather they are gifts of the Spirit integrated into the body of the Church, drawn to the centre which is Christ and then channelled into an evangelising impulse.

Therefore, in the view of certain research participants, global Marist leadership assumes the Marist charism as an important part of its identity. In this sense, global leaders become witnesses and promoters of the charism in the Marist life and mission.

To conclude this category, according to participants’ understanding, global leadership can be defined as both global and domestic in nature, and as having the capacity to influence the Institute and its members in the fulfilment of their mission. Characteristics of this leadership include: global vision, an attunement with the world, the capacity to overcome boundaries and a commitment to the Marist charism.

6.4.2 Prophetic Leadership

The second category identified was *prophetic leadership* (Figure 22). For participants, prophetic leadership was made up of five sub-categories, which include: being guided by the Gospel (26 participants); a transformative leadership approach (25 participants); an ability to read the signs of the times (11 participants); a servant leadership approach (eight participants) and a charismatic leadership approach (seven participants).

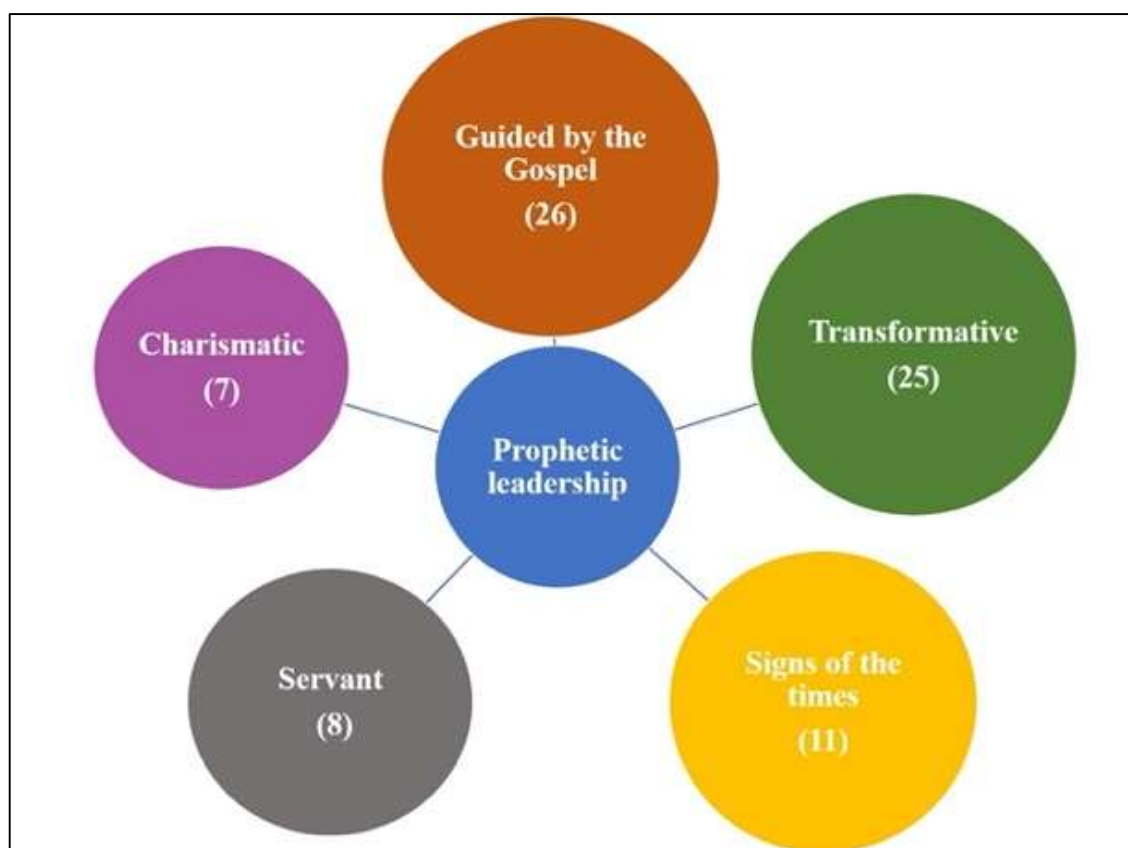


Figure 22. Understanding of Prophetic Leadership

Researcher's Source, 2021.

One of the participants, AU Marist Leader 34, defined prophetic leadership as “a way of life through which we announce the Gospel and feel deeply committed to a mission that is common and that is nourished by a charism”. This definition contains three important elements: “a way of life”, the “proclamation of the Gospel” and the “commitment to mission”. These elements are important connotations of the meaning of the word “prophet”.

As already presented in Chapter Four regarding global, prophetic and collaborative leadership, the word “prophet” in both its classical and biblical usage refers to someone who speaks for God or in the name of God (Ballarini and Bressan 1978, 10). In the Gospel, Jesus makes it clear that the essence of his message is the Kingdom of God: “seek first the Kingdom of God, and his righteousness; and all these things will be given to you as well” (Mt 6:33).

For Pope Francis, when the proposal of the Kingdom of God is taken up as a way of life and mission, life in society becomes a scenario of universal brotherhood, justice, peace and dignity, where both preaching and Christian life impact society (Francis 2013, n. 180).

Within this vision of prophetic leadership, Lydon (2009) suggests that an important challenge for religious congregations is to creatively maintain the prophetic witness of the devout in the face of members' reduced numbers and aging process. Faced with this reality, an essential aspect becomes the formation of leaders, Brothers and laypeople, who can co-responsibly assume a prophetic leadership, inspired by the Marist charism, in order to pursue the mission of building the Kingdom of God, together with children and young people.

The five subcategories that characterise prophetic leadership from the point of view of participants will now be presented.

a. Guided by the Gospel

The first subcategory dealing with prophetic leadership was that of being *guided by the Gospel*, which was cited by 26 participants, according to whom the understanding of leadership as guided by the Gospel encompasses attitudes, authenticity, the right to life and spirituality. For AU Marist Leader 40, prophetic leadership "is based on the Gospel". In the same vein, AU Marist Leader 42 stated that this type of leader should "be a bearer of the gospel and with the capability to share leadership skills in any given part of the world on the Church's mission".

Pope Francis states that: "The joy of the Gospel fills the hearts and lives of all who encounter Jesus. Those who accept his offer of salvation are set free from sin, sorrow, inner emptiness and loneliness. With Christ, joy is constantly born anew" (2013, n. 1).

Seeking to relate the concept of prophetic leadership to the Marian dimension of the Institute, AU Marist Leader 29 stated that this leadership "incarnates the Marian face of the Church and announces a Church of all and for all, in equality of conditions and in diversity of charisms and functions, according to each gift". Similarly, in relation to mission, AU Marist Leader 11 said that "a prophetic global leadership is attentive to values, defends life at all levels and inclusively promotes freedom and solidarity".

Corroborating the thinking of these two participants, the *Aparecida Document* states that:

life is enriched by giving and is weakened in isolation and comfort. In fact, those who most enjoy life are those who leave the safety of the shore and become passionate about the mission of communicating life to others. . . life is fully and maturely lived in proportion to how much one dedicates oneself to giving life to others. This is ultimately the mission. (Conselho Episcopal Latino-Americano – CELAM 2007, 60)

Synthesising this line of thought, Lydon (2009) states that the way Jesus taught people was through the example of his own life. His life was reflected in his call to the first disciples, when he said, “follow me” (Mt 4:9). Therefore, a prophetic leader guided by the Gospel must welcome Jesus into their life, living his Gospel and passing it on to others. This requires witness and defence of life, as well as the ongoing cultivation of a relationship with Jesus and his Gospel.

b. Transformative Leadership Approach

The second subcategory for prophetic leadership, cited by 25 participants, was that of adopting a *transformative leadership approach*. AU Marist Leader 30 stated that prophetic leadership “is focused on the transformation of reality in harmony with the Kingdom of God, encouraging personal and institutional processes in relation to the Marist charism”. Complementing this definition, AU Marist Leader 35 suggested that transformative leadership seeks “to ensure the vitality of the offer of value that characterises our organisation, in this case our Mission”.

Clearly, participants considered that transformative prophetic leadership is characterised by a commitment to improving reality, as inspired by Gospel values, as well as by personal and institutional processes. Corroborating the thinking of these two AU Marist Leaders, Bass and Riggio state that transformative leaders “help followers grow and develop into leaders by responding to individual followers’ needs by empowering them and by aligning the objectives and goals of the individual followers, the leader, the group, and the larger organization” (2006, 3).

Another important aspect of transformative prophetic leadership was the complete development of the other, as well as of oneself. As the leader undertakes to go through and then follows a process of transformation, they become more sensitive to the needs of others and those of their organisation. Pope Francis (2013, n. 9) writes about this same distinctive leadership style: saying that “every authentic experience of truth and goodness seeks by its very nature to grow within us, and any person who has experienced a profound liberation becomes more sensitive to the needs of others”.

Thus, a transformative prophetic leader inspires their followers through their search for the best way to accomplish their mission, as well as by their continuous process of developing their leadership. In regard to this, Bass and Riggio (2006, 3) state that

transformative leaders “are those who stimulate and inspire followers to both achieve extraordinary outcomes and, in the process, develop their own leadership capacity”.

c. Signs of the Times

The third subcategory relating to prophetic leadership, which was cited by 11 participants, pertains to the *signs of the times*, and more specifically on the capacity to read or discern the signs of the times. Defining prophetic leadership, AU Marist Leader 7 stated:

leadership which is able to read the signs of the times, discern what God wants us to be and what we should do in this turbulent world. To have a clear and unequivocal vision of the Marist mission in the present historical moment, aiming at perpetuity and sustainability for the future of the institution.

According to this participant, the prophetic leader is able to discern God’s will for how they should be and what they should do by engaging with reality and the needs of the world. In this way, a careful reading of the signs of the times helps promote a clearer vision for adequate responses to challenges presented by reality. For AU Marist Leader 8, prophetic leadership needed “to have a global vision, clear objectives, and foster a process to achieve the goals”.

The Bible says that prophets receive the gift of God to discern and interpret events. Therefore, they are like watchmen who spend the night waiting for the dawn (Is 21:11–2). For AU Marist Leader 36, “to watch” in prophetic leadership means “to visualise the emerging needs of poor children and young people” to whom one must put oneself at service. Similarly, Campbell (2015, 23) says that “without prophecy the vision is impoverished and the ministry the poorer”.

According to Costa (2015, 169), the prophets were able to look at apparently disconnected and even paradoxical events of every nature throughout the history of humanity and nonetheless perceive unity and coherence. They recognised God’s action in these events and could therefore find meaning in the events of life.

In a similar way, Pope Francis (2014), when referring to reading the signs of the times, states that it must be done through eyes of faith. Moreover, he adds that prophets are able to discern and denounce the evils of sin and injustice because they are free and have no interest other than God. Therefore, prophetic leadership tends to err on the side of the poor and the powerless, given that they recognise that God himself is on their side.

d. Servant Leadership Approach

The fourth subcategory that characterises prophetic leadership was that of adopting a *servant leadership approach*, an answer that was given by eight research participants. AU Marist Leader 12 stated that he “understands the prophetic leader from the perspective of one who is at service, who has charism, who points out paths, leads towards something greater”. Confirming this thought, AU Marist Leader 21 affirmed that prophetic leaders “understand leadership as a service to the human community or to a particular human group”.

As can be seen in these two quotations from research participants, prophetic leadership is understood as a service offered to others. A prophetic leader does not make use of power when exercising their mission; on the contrary, through the authority inherent to their charism, they place themselves at the service of others. This profile is also identified in the context of the Institute. In defining prophetic leadership, one of the participants suggested it as:

a leadership that is at the service of people, with a good charismatic formation, convinced and conscious of its Marist vocation, ready to encourage others in following Jesus in the style of Champagnat and Mary and with the availability to accompany and guide the processes of people at different levels and places. (AU Marist Leader 29)

In the passage of the Gospel of John retelling the washing of the feet (Jn 13:1–15), Jesus himself set the example of prophetic servant leadership. According to the Evangelist, at the end of the supper:

He got up from the meal, took off his outer clothing, and wrapped a towel around his waist. After that, he poured water into a basin and began to wash his disciples’ feet, drying them with the towel that was wrapped around him. . . .When he had finished washing his feet, he put on his clothes and returned to his place. ‘Do you understand what I have done for you?’ he asked them. ‘You call me ‘Teacher’ and ‘Lord,’ and rightly so, for that is what I am. Now that I, your Lord and Teacher, have washed your feet, you also should wash one another’s feet. I have set you an example that you should do as I have done for you’. (Jn 13:4–15)

In Jesus’ action, we can fully appreciate the prophetic servant leadership. The leader’s first concern is to care for the other who has been entrusted to him. Furthermore, in the Gospel of Saint John, Jesus asks Peter: “Simon, son of John, do you really love me?” (Jn 21:16). In Jesus’ question, love is presented as the central condition for servant leadership. Only true love can strip the leader of their personal interests, help them overcome their fears and feel fully free with regards to the mission entrusted to them.

Therefore, the love that Jesus asks of Peter is a free love, which recreates and generates life, always directed towards the other, in whom God himself is manifested. Thus, by serving the other, one is also serving God himself (Matt. 25:35–45). Jesus helps Peter to understand that his mission and his leadership are a service, namely the care of the other: “take care of my sheep” (Jn 21:17).

Rereading the foot washing episode, Greenleaf assures us that “the servant-leader is servant first. . . . It begins with the natural feelings that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead” (Greenleaf 2002, 27). Also, for this author, “the essential quality that sets servant-leaders apart from others is that they live by their conscience—the inward moral sense of what is right and what is wrong. That one quality is the difference between leadership that works and leadership—like servant leadership—that endures” (Greenleaf 2002, 4).

As such, from the perspective of research participants, prophetic servant leadership can be defined as a selfless service to others, the fruit of a profound experience of the love of God, from whom one feels called and sent to serve humanity.

e. Charismatic Leadership Approach

Finally, the fifth subcategory that characterises prophetic leadership was that of *charismatic leadership*, as expressed by seven research participants. According to participants, charismatic leadership has three main attributes: authority, inspiration and courage. On this dimension, AU Marist Leader 33 cited that “leadership with a Marist charismatic style is a style that takes care of the three areas of every charism: spirituality, community and mission”. Reinforcing the statement of this participant, AU Marist Leader 5 stated that this type of “leadership inspires and leads others to adopt these Marist values”.

According to these AU Marist Leaders, the prophetic charismatic leader can be recognised by his capacity to assume values, to develop his own style of leadership, to influence others to assume these values as well, and to carry out his mission. This line of thought coincides with that of Shamir *et al.* who state that:

the articulation of a vision and a mission by charismatic leaders presents goals in terms of the values they represent. Doing so makes action oriented toward the accomplishment of these goals more meaningful to the follower in the sense of being consistent with his or her self-concept. (1993, 583)

Similarly, Michael Green recognises that “a leader. . . will be someone who thinks, judges, feels and acts in ways that are resonant with what God wants, and who draws forth such resonance to be amplified in others” (2018, 149). Therefore, Green adds that the broader understanding of the prophetic leader’s mission is constituted by their charismatic style, and their recognition that their mission is also the mission of God.

The three attributes of authority, inspiration and courage that participants identified as characterising prophetic charismatic leaders can also be identified in other studies and literature. Regarding authority, the best example is the leadership of Jesus. According to the Gospel of St. Matthew (7:28–9), “when Jesus spoke these words, the crowds were astonished at his teachings. For He taught them as those in authority, and not as teachers of the law”. The depth of Jesus’ words goes beyond a profound reflection, revealing furthermore a style, an experience, a life choice and a deep recognition of Himself and his mission. This made Jesus’ authority be recognised by the people. Therefore, this is the leadership approach required by communities and organisations. According to Michael Green (2018, 149), “leadership requires someone who credibly personifies that to which the organisational entity aspires”.

The second attribute of charismatic prophetic leadership is to be inspiring. For Avolio and Yammariono (2013, 6), “the inspirational leader is persuasive and encourages followers to make sacrifices toward identified ideals, gives followers a sense of purpose and creates meaning for actions distinct from the charismatic process”. Moreover, according to these authors, in addition to the attributes of authority and inspiration, charismatic prophetic leadership must confront society’s status quo. In this sense, the third attribute of this type of leadership is that of courage (Avolio and Yammariono 2013, 6).

To conclude this category, it can be said that research participants considered prophetic leadership as a charismatic leadership guided by the Gospel, committed to the transformation of society, capable of reading and discerning the signs of the times, with leaders that understand their mission as a call from God in the service of others.

6.4.3 Collaborative Leadership

The third category is that of *collaborative leadership* (Figure 23). For participants, collaborative leadership consists of four sub-categories: cooperation (36 participants), co-

responsibility (19 participants), listening and dialogue (10 participants) and communion (three participants).

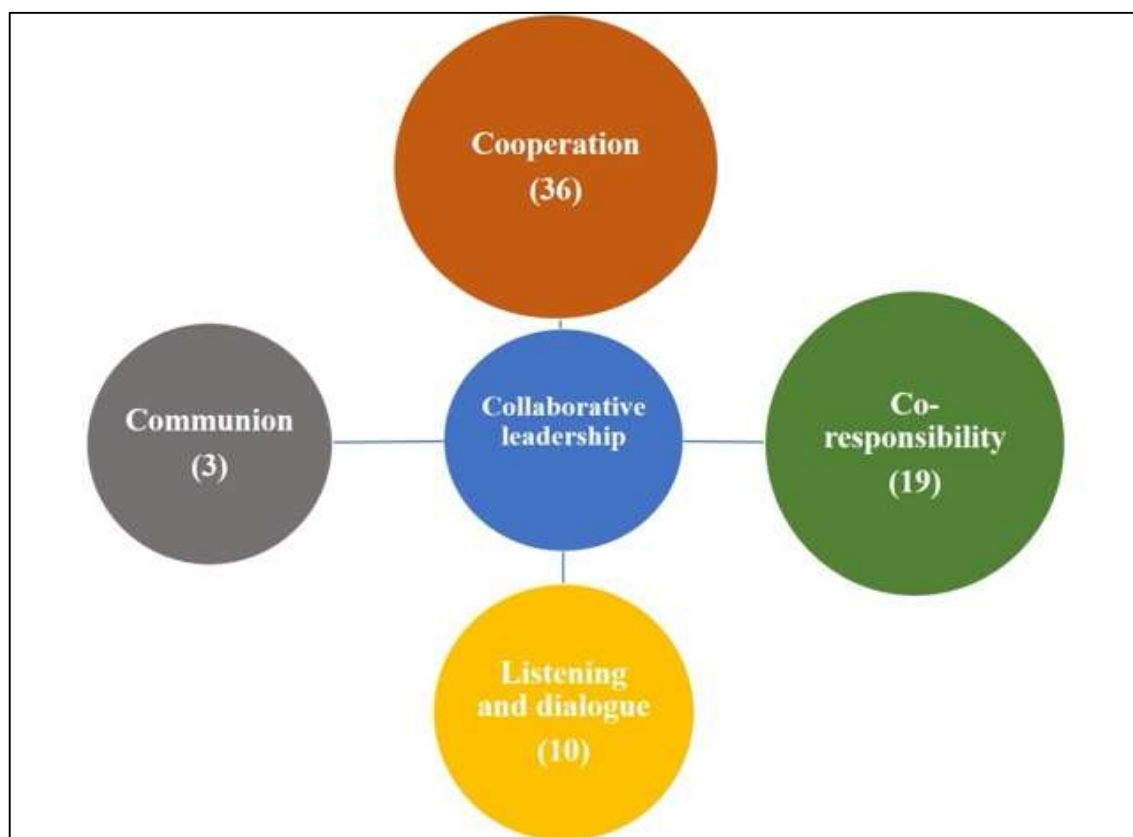


Figure 23. Understanding Collaborative Leadership

Researcher's Source, 2021.

For AU Marist Leader 3, collaborative leadership was “a leadership that finds cohesion and collective strength for a better future”. Complementing this idea, AU Marist Leader 5 cited a leader as one who “leads people to be actively involved in close collaboration with one another”. Furthermore, according to AU Marist Leader 47, “there is a great need for leaders who give themselves to bringing justice and humble themselves to collaborate with the people they work with”.

Based on participants' contributions, it was possible to highlight four elements that are key to understanding collaborative leadership. Firstly, the leader's ability to influence individuals, groups and communities towards achieving common goals. Secondly, their collaborative engagement with other leaders. Thirdly, the way they promote mutual collaboration within and between groups. Finally, the leader's ability to work with dedication and humility for the people in their team.

A perfect model of collaborative leadership can be found in the Holy Trinity. According to Leonardo Boff:

for those who have faith, the Trinitarian communion among the Divine Three, as the union between them in love and in vital interpenetration, can serve as a source of inspiration and utopia, generating models that increasingly integrate differences. . . . The community of the Father, the Son and the Holy Spirit represents the prototype for the human community dreamed up by those who want to improve society and thus build it up in the image and likeness of the Trinity. (1986, 17)

Collaborative leadership is an essential attribute for the Institute in order for it to strengthen itself and act as a global charismatic family. Furthermore, in order for the Institute's mission to be realised and best institutional collaborative practices to be employed, all leaders of the Institute must be committed to adopting the collaborative leadership approach. For Hurley, this type of leadership "is grounded in a belief that all of us together can be smarter, more creative, and more competent than any of us alone, especially when it comes to addressing the kinds of novel, complex, and multi-faceted problems that organisations face today" (2017, 3). In addition, "success depends on creating an environment of trust, mutual respect, and shared aspiration in which all can contribute fully and openly to achieving collective goals" (Hurley 2017, 3).

Based on participants' overall vision of collaborative leadership, the four sub-categories identified as characterising the collaborative leadership profile will now be presented.

a. Cooperation

Cooperation is the first subcategory defined as part of collaborative leadership and was cited by 36 participants. For AU Marist Leader 31, collaborative leadership is "leadership that is internationally aware, that cooperates and collaborates with what the other(s) needs and that is spiritual, that responds to the times of the Global Society, the Church and the Institution". Similarly, for AU Marist Leader 15, cooperation was a key element of the leadership profile committed to "cooperating along common lines of work".

Corroborating participants' statements, Maciel *et al.* (2008, 326) observe that "cooperation seems to be understood as the achievement of the individual's work in relation to others and the internalisation of organisational objectives". Therefore,

cooperation must meet the objectives of all those involved in a given initiative, requiring collective effort and dedication. Similarly, Bergamini states that:

the process of leadership usually involves a bidirectional relationship of influence, oriented mainly towards meeting mutual objectives, such as those of a group, organisation or society. Therefore, leadership is not only the responsibility of the leader, but also requires cooperative efforts from other people. (1994, 15–6)

Furthermore, for AU Marist Leader 30, collaborative leadership was “a leadership that goes beyond personalistic and individualistic visions, and is realised by working as a team, between teams and between different structures of animation and government”. Similarly, for AU Marist Leader 46, collaborative leadership must “promote the participation of all”. AU Marist Leader 14 emphasises that this type of leadership should be an “inclusive and trusted leadership”.

According to participants, noteworthy elements of the cooperative leader’s profile include teamwork, inclusion and networking. In order to ensure the achievement of a common mission in developing teamwork or cooperative work, it is necessary to create and foster an environment all parties involved to be able to interact. For Maciel *et al.* (2008, 326), interaction becomes cooperative behaviour when it is encouraged in given individual’s reality and work and entailing social construction processes. Consequently, when everyone feels valued and welcomed, the fruit of the interaction process is effectively inclusion.

Regarding networking, AU Marist Leader 33 stated that “today we do not understand work only under a responsible autonomy, but rather collaboratively, as part of a network and interdependently.” From Grayson and Baldwin perspective (2007), “leadership networking is about developing and using your networks in a way that builds relationships and strengthens alliances in service of your organisation’s work and goals”.

The reasons for networking can be numerous. For Lenz (2013, 364), networking is key to finding leaders, allies, financial sustainability, experience and ideas. Furthermore, according to the author, “effective leaders are also always looking for new ideas and expertise for their own development and for their organisation’s growth”.

Finally, cooperation can be considered a strategic element for collaborative leaders to achieve their mission, as it implies working with others in the pursuit of common interests that bring joint benefits, which are fundamental to the success of the mission.

b. Co-Responsibility

Co-responsibility, cited by 19 participants, was the second subcategory that characterises collaborative leadership. AU Marist Leader 43 stated that collaborative leadership “inspires a sense of co-responsibility among the different entities in the Institute”. AU Marist Leader 28 complemented this statement by remarking that “it is shared by Brothers and laypeople”.

Both statements reflect the efforts of many religious congregations to promote and strengthen the co-responsibility of their leaders across all levels of government and leadership, as well as in the different segments they operate in. For Michael Green:

within spiritual families themselves, especially those which have evolved from these education-oriented religious institutes, avenues for leadership and strategies for leadership succession need to continue to evolve to allow and encourage laypeople to assume genuine roles as leaders, and for this leadership to have authority and authenticity. (2018, 169)

Another factor highlighted by participants was the co-responsibility of Brothers and Lay Marists when it comes to Marist leadership. The Institute has come a long way in promoting co-responsibility for the Marist life and mission. However, there is still an urgent need to ensure co-responsibility among all leaders across the different institutional spheres of government, management and leadership. In addition, the laity need to be empowered to take co-responsibility for the Marist charism by means of the proper delegation of authority. The Constitutions and Statutes of the Institute of the Marist Brothers express co-responsibility thus:

within this charismatic family, we Brothers willingly contribute the richness of our consecrated lives by building communion, providing accompaniment, sharing our spirituality and community life, participating in joint formation and solidarity works, and promoting co-responsibility for Marist life and mission. (Institute of the Marist Brothers 2020a, 19)

Therefore, in the conception of participants, the delegation of authority, the empowerment of leaders—be they Brothers or laity—and that all be treated with appreciation constitute these necessary elements for collaborative leadership.

c. Listening and Dialogue

The third subcategory pertaining to collaborative leadership was *listening and dialogue*, which was mentioned by ten participants. According to AU Marist Leader 8, collaborative leadership required “dialogue, listening to and making decisions with discernment and common sense”. Further, AU Marist Leader 49 stated that it is necessary “to invite all voices to be heard around the table”. AU Marist Leader 22 added that:

the leadership of the congregation needs to have a vision that is capable of dialogue with the plurality of cultures, so that in each one it encourages the Marists to announce and give witness to the Good News of the Kingdom.

For participants, dialogue and listening are constitutive elements of the collaborative leadership profile. These elements enable leaders to understand the plurality of cultures, as well as optimising decision-making conditions and improving a leader’s performance in their mission. Listening allows one to know the real needs of individuals and of reality, while dialogue allows leaders to deepen this understanding.

In this sense, according to Soares (2016, 9229), listening provides a foundation for dialogue and dialogue would not be possible without listening. Therefore, it could be argued that listening encourages true dialogue, through which it is possible to give new meaning to the human being and his existence. For Freire:

dialogue is an existential requirement. And if dialogue is the encounter which solidarizes the reflection and action of its subjects when they address the world, allowing them to be transformed and humanized, then it cannot be reduced to an act of depositing one subject’s in another, nor can it become a simple exchange of ideas to be consumed by those involved. (1987, 49)

According to Freire, subjects analyse the same world through dialogue, distancing themselves from it in order to understand it, coinciding and opposing themselves in their understanding (Freire 1987, 10). The condition for the existence of dialogue is a deep love of human beings and of the world (Freire 1987, 50). Therefore, listening and profound dialogue favour the transformation of individuals, as well as of their organisations and communities.

d. Communion

Finally, the fourth subcategory regarding collaborative leadership was *communion*, which was mentioned by three participants. The low number of participants who mentioned it does not detract from the relevance of this subcategory and its connection to understanding collaborative leadership. To define a category or subcategory, it is important for the researcher to understand the characteristics and structures behind the information being analysed. According to Braun and Clarke (2006, 82):

As this is qualitative analysis, there is no hard-and fast answer to the question of what proportion of your data set needs to display evidence of the theme for it to be considered a theme. It is not the case that if it was present in 50% of one's data items, it would be a theme, but if it was present only in 47%, then it would not be a theme. Nor is it the case that a theme is only something that many data items give considerable attention to, rather than a sentence or two. A theme might be given considerable space in some data items, and little or none in others, or it might appear in relatively little of the data set. So, researcher judgement is necessary to determine what a theme is.

For AU Marist Leader 43, collaborative leadership “inspires a sense of communion in the Institute”. AU Marist Leader 15 complemented this idea by suggesting that this type of leadership should “establish healthy links with other Marist communities at provincial, regional and global levels to cooperate in common lines of work, those that deal with the global reality”.

Based on participants' statements, communion can be understood as the attunement and identification of Institute's members with their charism and mission in a concrete way, and which generates a transformational commitment. For them, communion inspires the whole community to fully live and build solid relationship bonds based on the Marist charism. In the vision of Pope Francis, “it is in communion, even when this proves painful, that a charism is seen to be authentic and mysteriously fruitful” (2013, n. 130).

Communion is materialised in the community when it welcomes and integrates diversity and all its entailing elements. Thus, for Pope Francis (2014, n. 3):

communion and the encounter between different charisms and vocations can open up a path of hope. No one contributes to the future in isolation, by his or her efforts alone, but by seeing himself or herself as part of a true communion which is constantly open to encounter, dialogue, attentive listening and mutual assistance.

For the Institute, communion is the expression of universal love, through which its members feel called “to be weavers of the fabric of communion through the witness of our brotherhood, a sign of the Reign of God” (Institute of the Marist Brothers 2020a, 29). Moreover, a path to communion is built together with lay Marists, based on a common following of Jesus, the same baptism, where all can find their universal vocation, enriching each other through communion (Institute of the Marist Brothers 2020a, 19).

Therefore, communion is closely associated with collaborative leadership. It encourages individuals, groups and communities to work cooperatively and co-responsibly in their pursuit of common goals. As such, collaborative leadership can be called the promoter of communion.

In concluding the analysis of this third category, it can be said that collaborative leadership, in research participants’ understanding, refers to the cooperation and co-responsibility of individuals towards a common mission, which always promotes communion. Collaborative leadership can be exemplified in teamwork, networking, the capacity for dialogue and for listening. Particularly in relation to the Marist charism, it refers to the collaboration and co-responsibility of Brothers and laity, and among the various segments of government, management, and leadership of the Institute.

6.5 THE STRENGTHS AND CHALLENGES OF THE FORMATION OF MARIST LEADERS FOR THE VITALITY AND CONTINUITY OF THE CHARISM

In this section, the objective is to explore the *strengths* and *challenges* involved in the formation of leaders to ensure the vitality and continuity of the Marist charism. Table 4, which presents both the *strengths* and *challenges* cited by research participants, will be used as a reference to analyse all categories of Marist leadership formation.

Strengths			Challenges		
Category	Subcategory	Ref.	Category	Subcategory	Ref.
Emphasis on Marist Identity Formation		50	Strengthening Co-responsibility for the Marist Charism		56
	Marist Charism Formation	29	Strengthening Leadership Formation Programmes		34
	Co-Responsibility	15		Lack of Formation Programmes	9
	Care of the Marist Vocation	11		Quality of the Formation Programmes Developed	4
Good Quality of Formation Programmes		37	Implementation of a Leadership Formation Management Programme		31
	Methodology	24		Accompaniment of Leadership	31
	Exchange of Experiences	9		Clarification of the Profile of Marist Leadership	30
	Holistic Development	4		Prepare New Leaders	10
Leadership Skills Development		29	Care of Marist Vocations		31
Institutional Support		24	Offer Greater Institutional Support		25
	Structures	12		Allocation of Resources Needed for Formation	17
	Resources Availability	11		Definition of Institutional Formation Policies	8
Formation in the Marist Mission		20	Strengthening Formation in the Marist Mission		11
				Building a Common Vision of the Marist Mission	8

Table 4. Strengths and Challenges of the Formation of Marist Leaders
 Researcher's Source, 2021.

6.5.1 Crucial Strengths of the Formation of Marist Leaders

Research participants were asked the question: “could you suggest what are the crucial strengths of the formation of the Marist leaders (Brothers and laypeople) today to ensure the vitality and continuity of the Marist charism?”.

On the basis of participants’ responses, as presented in Table 4, five relevant categories were identified: emphasis on Marist identity formation, good quality of formation programmes, leadership skills development, institutional support and formation in the Marist mission.

a. Emphasis on Marist Identity Formation

For the first category which was *emphasis on Marist identity formation*, there were 50 references¹², comprising three subcategories: *Marist charism formation* (29), *Co-responsibility* (15) and *care of the Marist vocation* (11). Corroborating the importance of formation for Marist identity, AU Marist Leader 1 affirmed that “each meeting allowed me to deepen my Marist identity through human and spiritual experiences linked to the dimensions of the Marist charism”.

A *Marist charism formation* was the subcategory with the greatest number of references, totalling 29. For AU Marist Leader 8, “experiencing our origins as an Institute is essential to keeping alive our Marist values, the aspects that make us who we are, and able to carry on the mission entrusted to us”. Regarding charism, participants highlighted the sense of a global family (11), Marist spirituality (8), the life of Marcellin Champagnat (3), international experiences (3), fraternity experience (1) and interculturality (1).

Co-responsibility was the second most cited subcategory, with 15 references from research participants. According to AU Marist Leader 30, “the delegation and distribution of power is a strength in the pursuit of participative construction and generative dialogue. There is an awareness of the urgency of co-responsibility”. In addition to the co-responsibility for the Marist charism shared between the Institute’s various levels and spheres of government and leadership, AU Marist Leader 28 drew attention to a greater level of awareness of co-responsibility for the Marist charism between Brothers and laypeople. For this leader, “those that stand out have a greater co-responsibility between

¹² Total of references.

Brothers and laypeople. The laypeople have a greater awareness of their vocation in the Church and in the charism and they assume their responsibility”.

Care of the Marist vocation was the third subcategory identified in participants’ responses, with 11 references. Participants mentioned how much attention Brothers and laity gave to the Marist vocation, most especially through the “processes of vocational discernment and accompaniment” (AU Marist Leader 32). In addition, special recognition was given to the accompaniment of the “lay Marist Vocation” (4) and the possibility of “charismatic bonding” (4) of the laity. According to AU Marist Leader 29, the processes of accompanying the laity contributed to “maturity in their faith and in their attachment to the charism”. AU Marist Leader 32 complements this by stating that “the Laity feel that the charism also belongs to them”.

In conclusion, the *emphasis on a good Marist identity formation* stands out as a key factor for the continuity of the charism. For Wolfers *et al.* (2017, 85) “understanding identity as a dynamic and inherently collaborative process that is enacted as interlocutors focus on each other and negotiate their own and each other’s expectations and roles” is essential. On this issue, Michael Green says that “an important factor in their assuring good formation will be their continuing to nurture people who can hold and pass on the accumulated wisdom of their particular spiritual family” (2018, 179), as it is through this method that the charism can be deepened, fully experienced and transmitted to future generations.

b. Good Quality of Formation Programmes

The second category was *good quality of formation programmes*, with 37 references. According to research participants, the following subcategories exemplified elements of the formation programmes: *methodology* (24), *exchange of experiences* (9) and *holistic development* (4). For AU Marist Leader 22, “there are programmes aimed at the formation of principals, teachers and youth ministry leaders; such programmes have a high degree of experiential participation, theoretical enlightenment and common construction”. Similarly, AU Marist Leader 38 affirmed that “the formation programmes prepare our Brothers and Lay Marists to become committed, competent, to be open to learning”.

The subcategory *methodology* was noticeably emphasised by participants, with 24 references. In participants’ understanding, elements of training programmes methodology

included the experiential dimension (8), joint formation (3), adaptability and flexibility (2) and the use of a virtual environment for learning (1) for selected training programmes. For AU Marist leader 38, there was a “wide variety of formations available to those who wish to improve themselves”. In the understanding of AU Marist Leader 5, the methodologies of the training programmes favoured:

an integral formation, therefore, which clearly names Marist values (family spirit, presence and listening, love of one’s work and pragmatism, love of young people and especially of the abandoned, in the manner of Mary, relationship with Mary and God), origins.

The second most cited subcategory was *exchange of experiences*, with nine references. For AU Marist Leader 35, the “socialisation of good practices was very important for my leadership”. On this issue, AU Marist Leader 22 affirmed that:

in the last 30 years, Brothers who have embarked on academic studies related to issues of corporate governance and business management, and who share what they are studying and who participate in the governance and management bodies of their Units, have allowed the global body to grow in these disciplines, which seem to respond better to the continuous evolution of cultural contexts.

Similarly, AU Marist Leader 34 recounts that “there are Brothers and laypeople capable of communicating knowledge, but above all of telling the story and Marist experience in formation programmes”. This exchange of experience, for the AU Marist Leaders, is essential to their connection, understanding, and commitment to the charism.

The third subcategory is *holistic development*, with four references from research participants. For AU Marist Leader 26, the programmes offer “a holistic vision of the person and of reality (integral ecology)”. Corroborating this affirmation, AU Marist Leader 11 said that programmes offered “the possibility of combining elements of professional management with spirituality and charism”.

For Paulo Freire (1996, 19), “in formation. . . critical reflection on a given practice is a fundamental moment. It is by thinking critically about today’s and yesterday’s practices that one can improve the following practice”. Thus, in the view of participants, the quality of formation programmes offered to Marist leaders contributes to the improvement of their leadership practices in the Marist life and mission.

c. *Leadership Skills Development*

The third subcategory is *leadership skills development*, which had 29 references, and for which participants identified the following elements: a focus on personal development (8), the development of leadership tools (4), pastoral care (4) and the identification and preparation of new leaders (1).

For AU Marist Leader 54, leadership skills development has contributed to improving “listening, the ability to discern, to know people and their story, to enter into their context, to have the ability to lift people up to see new ways and visions for living life and faith”. In a similar way, for AU Marist Leader 13, this type of formation has favoured:

the confidence and charism that the manager awakens in the community where he works; the wisdom with which he enhances the creativity of his team; the clear, objective and diplomatic way in which he communicates, favouring a good relationship; the sensitivity in sharing his knowledge with simplicity and modesty, without arrogance and, understanding and respecting the different opinions.

For AU Marist Leader 42, “good Marist leadership formation impacts the people we minister in a positive way in any given ministry”. Reinforcing this idea, Collato (2008, 14) affirms that “mobilising knowledge and skills in leadership should not just focus on fostering innovation, but also on motivating people to learn more and more, as well as guaranteeing the socialisation of their learning within their respective organisations”. Thus, for research participants, an accent on leadership skills development in formation programmes is considered of great relevance for Marist leadership, particularly as this can contribute to equipping Marist leaders with the necessary skills and a mastery of the tools they require to excel at their mission.

d. *Institutional Support*

Institutional support for leadership training programmes was the fourth category identified in participants’ responses, with 24 references. Participants identified two subcategories, namely *structures* provided (12) and *resource availability* (11). Regarding *structures*, research participants emphasised the regional structures that rendered programmes possible (4), regional or global leaders’ presence in programmes (3), the strategic plan of the general administration (2), the networks of connections with other

Marist leaders (2) and the Secretariats of the General Administration (1). Regarding *resource availability*, research participants valued the capacity of the leadership formators in the programmes (4), the quality of the leaders participating in the programmes (4), the economic and financial resources allocated for the formation (2) and the available Marist Documents (1).

According to AU Marist Leader 48, an “emphasis on the ‘thrust of the Institute’, as articulated by the current General and Local administration” is essential for leaders’ formation. AU Marist Leader 39 identified as most significant “support and vision from centralised government” as essential for guaranteeing formation programmes. In addition, AU Marist Leader 43 affirmed that “regional collaboration in formation opportunities allow the sharing of resource persons who are experts in formation”.

From the motivational perspective of Marist leaders, one of the research participants had observed that the encouraging presence of all participants and coordinators had been important, as it contributed to “sharing projects, ideals and life, which help us to be creative and live inspiring lives” (AU Marist Leader 23). As such, the Institute believes that in addition to contributing human and financial resources for the formation of leaders, it is also essential to provide them with a global vision of mission, personal development and opportunities to experience solidarity with the underprivileged (The International Marist Education Commission 2007, 59). Therefore, according to research participants, ensuring quality formation for Marist leaders means guaranteeing quality human, financial, material and logistical resources—among other aspects—, as well as close moral support from those accompanying them.

e. Formation in the Marist Mission

The fifth category regarding formation programme strengths is *formation in the Marist mission*, with 20 references. Key examples of formation content mentioned were Marist education (4), the emerging needs of today’s world (4), inclusion (4), the reality of children and youth today (2), ecology (1) and the context of people afflicted by poverty (1).

For AU Marist Leader 20, the formation in the mission provided “a global vision of the Marist mission”. This perception was shared by AU Marist Leader 21, who stated that the formation gave them “the knowledge, appropriation and implementation of our Marist educational mission, which in one way or another is our navigation chart”.

More specifically, regarding particular aspects of the Marist mission, AU Marist Leader 11 emphasised “the field of education as a desirable, necessary element/space with transformative potential”. AU Marist Leader 44 highlighted the importance of a “formation geared towards the youth and children, who are the future of humanity”. With regard to this same concern, AU Marist Leader 1 signalled that “the formation meetings have allowed me to increase and nourish my sensitivity to emerging needs and those on the margins of society”.

For Seán Sammon (2006, 33), the apostolic efforts of Marist leaders should be directed towards the children and youth they have been called to serve. Additionally, according to Sammon, “we are consecrated for mission; that fact is central to the covenant relationship that we have with God and one another” (Sammon 2006, 36). Thus, interpreting the Marist mission within the context of today’s children and youth is essential for its vitality and continuity.

6.5.2 Challenges of the Formation of Marist Leaders

Table 3 also presents participants’ perceptions of current challenges for Marist leaders’ formation. The phrasing of the question was: “could you suggest what are the challenges of the formation of the Marist leaders (Brothers and laypeople) today to ensure the vitality and continuity of the Marist charism?”

Six relevant categories were identified: strengthening co-responsibility for the Marist charism (56), strengthening leadership formation programmes (34), implementation of a leadership formation management programme (31), care of Marist vocations (31), offer greater Institutional support (25) and strengthening formation in the Marist mission (11). It is worth noting that the nature of the challenges identified coincides directly with that of the strengths explored above.

a. Strengthening Co-responsibility for the Marist Charism

The first category that characterises present challenges for *Marist* leadership formation is *strengthening co-responsibility for the Marist charism*, with 56 references. Participants indicated key elements for this category as the following: the need to promote charismatic reference communities for Marist educational centres (7); the need to

empower lay leaders (5); the need to strengthen co-responsibility for Brothers and laity (3); and the need to promote greater co-responsibility among men and women (3).

For AU Marist Leader 26, the Institute needed to “overcome the fear of losing power, open up to new forms of organisation that respond to the evolutionary moment”. Complementing this thinking, AU Marist Leader 55 stated that “equity in decision-making” is needed. On this aspect, AU Marist Leader 43 suggested “the need for more laypeople to assume leadership roles in the structures of animation. Visibility of Lay leaders in key positions of global responsibilities is key to ensuring vitality and continuity of the charism”.

However, AU Marist Leader 2 emphasised that “not all the administrative authorities of the Institute are mobilised and convinced of the importance and relevance of co-responsibility between Brothers and laypeople”. Regarding this issue, AU Marist Leader 23 believed it is urgent:

to know and to discern what this means for the Brothers and what it means for the laity. And to begin to design processes that are really on that road. Co-responsibility is something much wider and deeper than delegating tasks of mission and direction to the laity. We talk a lot about this topic in theory, but I believe that we have not dealt with it in depth.

Regarding processes of reflection and discernment about co-responsibility in the Marist organisation, according to AU Marist Leader 1, the Institute “must be able to include an approach for both women and men”. Similarly, AU Marist Leader 2 argued that “women are still too little represented in the spheres of power and decision making” in the Institute.

The document *Gathered Around the Same Table* says that in their vocations, laypeople and Brothers have much more in common than not, since they all share in both the beauty and limits of the human condition at this historical moment; they live the same Christian vocation since baptism, and feel the call of God to the Marist charism (International Editorial Commission 2009, 28). Regarding the laity, the same document states that they contribute in a specific way to living the Marist charism by being much more than collaborators with the Brothers (International Editorial Commission 2009, 30).

Finally, regarding the presence of women in the Institute, the aforementioned document affirms that “living the Marist charism from the perspective of women invites us all to adopt in our lives the Marian elements such as tenacity, stamina, maternal

affection, tenderness, attention to detail and intuition in our daily experience” (International Editorial Commission 2009, 31).

b. Strengthening Leadership Formation Programmes

The second category regarding current challenges was the need to *strengthen the leadership formation programmes*, with 34 references. The subcategories are the *lack of formation programmes* (9) and the need to improve the *quality of the formation programmes developed* (4). Relevant elements of the *lack of formation programmes* subcategory identified by research participants include the insufficiency of ongoing formation programmes (2) and the little knowledge of other Marist realities (2). Regarding the need to improve the *quality of the formation programmes*, participants indicated the following needs: formative approach (7), spiritual formation (7), formation contents (6), formation results (5), Marist charism (3), sharing experiences (3) and language (3).

For AU Marist leader 11, current formation programmes lacked “clear processes, objectives, results to achieve”. Similarly, according to AU Marist Leader 46, “there are formation programmes that are not followed up, or with poor implementation”. For AU Marist Leader 5, it was a “challenge to have places and programmes recognised and validated and to have people willing to participate in them”. Finally, for AU Marist Leader 42, there was a “lack of regular formation and leadership programmes for different levels. Insufficient leadership and formation programmes for both Brothers and Lay together”.

Regarding the need to strengthen leadership formation programmes, the Institute of the Marist Brothers recognises that they must:

be open, integrating, cyclical and flexible, adapted to the reality of the person, with proposals that allow him/her to grow in the Marist way. Such proposals arise in a context of accompaniment, which includes walking with others who are also experiencing their process and experiencing the community dimension inherent to being Marist. (Secretariat of the Laity, 2017, 38)

Consequently, participants believe that to achieve the vitality and continuity of the Marist charism, leadership formation programmes must be reinforced across all institutional levels. At the same time, present realities must be accounted for, where

availability is insufficient or non-existent, and the formation of both Brothers and lay Marists is another factor to consider.

c. Implementation of a Leadership Formation Management Programme

The third category, with 31 references, was the need for the *implementation of a leadership training management programme*. For research participants, this category includes three subcategories. The first was the subcategory of managing *leadership accompaniment* processes (31), seeking to build a leadership mentality for today (9). The second subcategory was the major *clarification of the profile of Marist leadership* (30), which includes the review of accompaniment processes (6), personal development (6), professional development (4), balance between training and work responsibilities (4), leadership performance (3), talent retention (3), accompaniment of senior leaders and those in key positions in the institution (3) and reduction of activism (2). And the third subcategory is regarding *preparing new leaders* (10).

Research participants credited a number of different reasons for the urgency of implementing a leadership formation management programme for the Institute. According to AU Marist Leader 32, one issue was “the conciliation between the time required by the formative processes, the work in the daily reality and the processes of assuming responsibility in the local/provincial/regional realities”. For this particular leader, “this balance usually lies in the willingness and voluntariness of the people, there is no structured time for these processes”. AU Marist Leader 31 spoke about another need which was “to integrate supervision”.

Other participants referred to the importance of ensuring “personal accompaniment” (AU Marist Leader 15), “professional formation” (AU Marist Leader 3) and the accompaniment of leadership performance (AU Marist Leader 10), especially for leaders that “play key roles within the organisation” (AU Marist Leader 24). Another point was the need to overcome “the lack of a universal understanding of the role and responsibilities of Marist leaders” (AU Marist Leader 2), as well as a “lack of common and clear understanding of what being a Marist is” (AU Marist Leader 44). For AU Marist Leader 7, “ensuring that these people continue to be a part of our staff for a long period of time and are constantly updated”.

According to Penzias (2014, 212), the formation and accompaniment of leadership requires “the development of an educational plan to address identified

opportunities within established timeframes, and to plan for assisting staff in meeting their professional development and departmental goals using available resources, flexible scheduling and mentoring”. Therefore, in view of the above, it could be argued that the implementation of a leadership training management programme is an urgent issue for the Institute.

d. Care of Marist Vocations

The fourth category concerned *care of Marist vocations*, with 31 references. Quotations from research participants on this issue reveal their concern with the reduction and aging of vocations for Marist Brothers (5) and the need for solid itineraries of vocational accompaniment for Brothers and laity (5).

For AU Marist Leader 19, “a first challenge is the care of Marist vocation, since formation in the charism is not limited to intellectual content but involves one’s own life”. AU Marist Leader 34 pointed out “the challenge of assuring, for all who request it, vocational accompaniment, systematic Marist formation that responds to a strategic vision of continuity of the charism”. Validating this affirmation, AU Marist Leader 29 suggested that a difficulty for the Institute was the “implementation of vocational processes rooted in the charism”. AU Marist Leader 18 identified that the Institute should give special attention to the “reduced number of vocations and of committed laypeople”.

Regarding the Marist vocation, the Institute states that “laypeople and Brothers strengthen our specific vocations to the extent that we meet with each other on a road that opens up to the future and from which we have already discovered significant features” (International Editorial Commission 2009, 31). In this way, caring for Marist vocations should foster both the vocation of Brothers and that of lay Marists in such a way that they can nourish each other, guaranteeing their mutual growth, the vitality of the charism, and their permanent involvement with children and young people.

e. Offer Greater Institutional Support

The challenge of *Offering greater institutional support* for the formation of Marist leadership emerged as a fifth category, with 25 references and two subcategories. The first subcategory was the *allocation of resources needed for formation* (17). As elements of this subcategory, participants indicated the need for more economic support (9), the

availability of leadership formators (7) and adequate structures for formation programmes (1). The second subcategory is the *definition of institutional formation policies* (8). According to participants, the elements of this subcategory are intra-institutional cooperation (3), agility in decision making (3), openness to external collaboration (1), and how the institution positions itself in the face of challenges (1).

For participants, one significant challenge was guaranteeing the financial and human resources needed for formation programmes. For AU Marist Leader 24, what was necessary is “to create structures of economic support at the provincial and regional level that allow the development of the different initiatives in formation”. AU Marist Leader 55 remarked that “financial constraints do not allow the Institute and the Provinces to prioritise formation”. In addition to the economic and financial aspects, AU Marist Leader 36 said that there is a “lack of good, trained formators of leaders”.

AU Marist Leader 31 affirmed that there was a need for greater support regarding “governance, responsibility and decision making. Knowledge of the dynamics of organisations and groups; possibilities for creative, generative and collaborative intervention”. Complementing this line of thought, AU Marist Leader 40 alleges that the challenge was to define “how best to balance the local and international nature of the formation opportunities”.

Regarding the use of institutional resources for the Marist life and mission, including the formation of leaders, the 22nd General Chapter pointed out the need for the Institute to:

develop a plan for the just sharing of human and financial resources at all levels of the institute, including finding new sources of income and the creation of services and funds to support formation, solidarity, and an expanded mission. (Institute of the Marist Brothers 2017, 14)

To conclude, one of the Institute’s great challenges is to ensure greater financial support, human resources and knowledge for the formation of leaders with a view to the future of the charism. Priorities should be on the contexts and areas where the Marist life and mission are at their most vulnerable, especially in Africa and Asia, where greater attention is required.

f. Strengthening Formation in the Marist Mission

Finally, the sixth category was *strengthening formation in the Marist mission*, with 11 references. The subcategory identified was the need for *building a common vision of the Marist mission* (8) in order to meet the challenges of today's world (3).

According to AU Marist Leader 44, there exists a “lack of common vision” of the Marist mission. Similarly, AU Marist Leader 6 affirmed that it was necessary “to have clarity of the Marist mission today, what it means and needs to be in this changing world”. For this to happen, according to this same leader, it was essential “to have the courage to free oneself from the bonds of the traditional way of educating and to discover new ways of being present and taking educational action”. Finalising, AU Marist Leader 35 reflected on leaders' need to develop the “capacity to listen attentively to reality”.

In the document of the 22nd General Chapter, participants of this assembly asked the General Government to consider:

evaluating and adapting our mission of evangelization to the context of emerging realities. To build Marist mission networks at the levels of Administrative Units, Regions and the General Administration, which favour innovation and the renewal of our education and evangelization. (Institute of the Marist Brothers 2017, 11)

To conclude, mission is a central element of the Marist charism. Around it, Brothers and laity must nourish their vocation and spirituality and place themselves at the service of the evangelisation and education of children and young people. For this reason, *strengthening formation in the Marist mission* becomes essential to ensure the preparation of leaders who are capable of facing the challenges of children and young people in today's world, and who are able to do this by adapting the Marist charism to current and future contexts.

6.6 THE KEY ELEMENTS FOR THE FORMATION OF PROPHETIC AND COLLABORATIVE LEADERS FOR THE VITALITY AND CONTINUITY OF THE MARIST CHARISM

In this section, the objective is to present the key elements required for the formation of prophetic and collaborative leaders, to ensure the vitality and continuity of the Marist charism. The question posed to questionnaire participants was: “could you suggest what are the key elements that should guide the formation of the Marist leaders

(Brothers and laypeople) in the future to ensure the vitality and continuity of the Marist charism”?

On the basis of participants’ responses, as outlined in Table 5, six categories and their respective subcategories were identified: *promoting greater knowledge of the Marist charism, promoting co-responsibility between brothers and lay Marists, offering a personalized development process, ensuring the development of leadership skills, strengthening formation processes and preparing new leaders.*

Key Elements		
Category	Subcategory	References
Promoting Greater Knowledge of the Marist Charism		50
	Creating a Broad Vision of Marist Life and Mission	22
Promoting Co-responsibility Between Brothers and Lay Marists		44
	Empowering Lay Marists	11
	Promoting Experiences of Marist Community Life	10
Offering a Personalised Development Process		38
	Helping in the Development of Interiority and Spirituality	17
	Contributing to Self-awareness Processes	5
Ensuring the Development of Leadership Skills		32
	Better Defining the Profile of the Marist Leader	13
Strengthening Formation Processes		29
	Strengthening the Formation Programmes of Marist Leaders	19
	Articulating Theory and Practice	13
	Responding to Emerging Themes	10
	Ensuring the Allocation of Necessary Resources	2
Preparing New Leaders		5

Table 5. Key Elements for the Formation of Marist Leaders
Researcher’s Source, 2021.

a. *Promoting Greater Knowledge of the Marist Charism*

The first category pertaining to key elements for the formation of prophetic and collaborative leaders was *promoting greater knowledge of the Marist charism*, with 50 references and the subcategory *creating a broad vision of Marist life and mission* (22).

Participants identified the need for formation processes to go directly to the core of the Marist charism, known as fraternal life, spirituality and mission, while simultaneously seeking to understand the context and historical evolution, language and meaning that the Marist charism has acquired over the years. In this sense, AU Marist Leader 28 stressed that a key element for the formation of leaders was the “deepening of fundamental experiences related to the charism (spirituality, shared life and mission)”. AU Marist Leader 30 pointed out the “work on charismatic aspects, historical foundation and expression, language and updated concretions”. According to AU Marist Leader 25, “more than knowing the charism, connecting with the deep motivations of the first Marists in a way that touches the heart and directs the energies” was vital. Complementing this statement, AU Marist Leader 38 expressed that it was essential to help Marist leadership by “living and breathing our Marist Charism”.

AU Marist Leader 43, however, cited the need to:

appropriate charism to the contemporary time. Study of the founder to ensure rootedness in the charism; in-depth formation on the core themes of the charism: spirituality; Communion and shared life. and contextualizing these key elements of the charism in the current situations. How are these relevant in the “now time”.

With regard to *creating a broad vision of Marist life and mission*, Marist Leader 40 commented that it was urgent to contribute to a “broad canvas of Marist life and mission—Brother and lay, diverse contexts and cultures”. On the same issue, AU Marist Leader 44 declared that the Institute must “deepen the cultural aspect and diversity: how the Marist charism impacts a particular culture?” AU Marist Leader 53 expressed themselves in a similar fashion, saying that the Marist life and mission must “be open to all kind of human beings, being really clear that love knows no boundaries (sex, race, sexuality), and have a modern and realistic outlook on the world”.

For Barba (2020), opportunities must be created to ensure knowledge and transmission of the charism. In order to achieve this, it is necessary:

besides the example of so many Brothers and laypeople who passionately live the gift of the charism, we need to create opportunities for showing the charism in action and talking

about its continuing relevance. It is our turn to take up the task of sharing the gift that the Spirit made available through Saint Marcellin Champagnat and which, over the years, has been evolving and adapting in each period of history. (2020, 78–9)

Promoting greater knowledge of the Marist charism becomes essential for the future of the Institute. There is an urgent need for initiatives that guarantee a deeper knowledge of the charism for all those involved in the Marist life and mission. Likewise, Marist leaders must be assured access to greater knowledge and experience of the charism in such a way that they can help reinterpret it in the context of the contemporary world.

b. Promoting Co-responsibility Between Brothers and Lay Marists

The second category was *promoting co-responsibility between Brothers and lay Marists*, with 44 references. Two subcategories further enrich this key element for the formation of prophetic and collaborative leaders: *empowering lay Marists* (11) and *promoting experiences of Marist community life* (10).

According to AU Marist Leader 27, promoting leaders' "charismatic co-responsibility" can contribute in an exceptional way to the vitality of the charism and the development of prophetic and collaborative leaders. Likewise, AU Marist Leader 22 stated that:

it seems to me that the vitality and the continuity of the Marist charism passes through taking steps in co-responsibility. Perhaps this is not lived in the same way throughout the world, but there are certain provinces and regions where it is already beginning to be an "urgency".

In the vision of other leaders, the personal commitment of each leader to the charism is essential for an effective co-responsibility, thus stated AU Marist Leader 31:

the formation that is being given may be considered valuable, but it will not produce real effects of change if the people affected by it do not make a personal commitment to make it their own and do not take the necessary steps to respond to their requirements.

For research participants, co-responsibility went beyond the organisational dimension of the Institute, and should focus urgently on creating the conditions and structures that can *empower laypeople*. On this, AU Marist Leader 44 pointed out the need to "empower the laity in living and promoting Marist values. Setting up structures that encourage true and real commitment among the laity". Similarly, AU Marist Leader 27 recounted that it was necessary to pay special attention to the "identity of the lay Marist

and charismatic maturity. Mission of the lay Marists. Associative structures at the service of the charism”.

Corroborating participants’ statements, Barba (2020, 69) affirms that “the XXII General Chapter. . . noted that the future of our charism will be based on a communion of fully committed Marists and that we need structures and processes that recognise and support our different vocational paths as Marists”.

Another important element for the commitment of Brothers and laity to the charism is *promoting experiences of Marist community life*. This type of experience allows one to live the charism in depth from an experiential perspective, contributing to the strengthening of values and communion around the Marist charism. For AU Marist Leader 16, it is “the experience of Marist life shared with others who already live it”. At the same time, according to AU Marist Leader 55, it was essential to ensure a “formation which fosters an inclusive sense of family and community and what constitutes a Marist dimension of that”.

Promoting co-responsibility between Brothers and lay Marists, according to participants, is essential for the formation of prophetic and collaborative leaders committed to the future of the Marist charism, as it encourages a common vision of the vitality of the charism and the joint search for responses to help realise it. Likewise, co-responsibility is based on communion and on opening paths for joint experiences of the charism, giving greater meaning to the life and vocation of all those who feel called to live it.

c. Offering a Personalised Development Process

The third category was offering a personalised development process, with 38 references. The two associated subcategories are Helping in the development of interiority and spirituality (17) and contributing to self-awareness processes (5).

For participants, a personalised accompaniment contributes to the best development of prophetic and collaborative leaders, by focusing on the specific needs of each leader, their integral development and their work performance. According to AU Marist Leader 1, it was important to offer leaders “a personalised journey, proposing a passionate commitment to life in all its dimensions: human, ecological, spiritual”. A personalised accompaniment process would also help the leader to better serve the people they are leading. Therefore, according to AU Marist Leader 25, this process will impact

“the spiritual dimension of persons and communities, the care of persons, teams and communities (accompaniment, development)”.

Self-awareness processes can bring many benefits to the development of leaders, as well as to the institution. They guarantee greater attention given to certain personal and professional aspects in order that they are developed more effectively, favouring better integration of the human, spiritual, social, psychological and charismatic dimensions, among others. For this reason, AU Marist Leader 49 pointed out that it was essential for the future of the charism to “ensure leaders have ongoing practical support and accompaniment support once accepting their leadership role”. AU Marist Leader 21 expressed that it was important to “clarify the areas of necessary training (government, charism, economy, administration), one could speak of ‘vocational developments within the Marist vocation’”.

Regarding Helping in the development of interiority and spirituality of leadership, AU Marist Leader 16 prioritised the importance of “experiences of personal growth, discernment and spirituality accompaniment”. Similarly, AU Marist Leader 7 shared their thoughts with regard to the need for “strong spiritual formation that bring the experience of God and Mary of great depth”. For AU Marist Leader 11, it was significant “to deepen the relationship between management and spirituality; to take up and cultivate Marist Apostolic Spirituality in its essence and good practices”.

For Lafortune and Lepage (2009, 5), “accompanying a prescribed change or one that contains prescriptive elements is different from helping an individual or several people try out a professional experience of interest”. According to these authors, “the accompaniment. . . draws on reflection within and about the action to ensure continuity and cohesion with the directions of the change to be implemented” (Lafortune and Lepage 2009, 10). The Institute of the Marist Brothers’ Secretariat of the Laity states that “the formation pathway that is offered must allow a person to live processes of personal growth from a vocational perspective. . . human, Christian or Marist” (Secretariat of the Laity 2017, 58). In light of this, the personalised accompaniment of leaders should focus on leaders’ personal development as well as the changes they were called to undertake. A solid process of transformation, personal and professional growth will consequently result in an excellent impact on the vitality of the Marist life and mission.

d. Ensuring the Development of Leadership Skills

The fourth category regarding the formation of prophetic and collaborative leaders, the need for *ensuring the development of leadership skills* had 32 references. Within this category, participants also signalled the relevance of *better defining the profile of the Marist leader* (13).

With regard to the *development of leadership skills*, participants focused on the needed to ensure a “systemic vision, charisma, sensitivity to manage the processes, capacity to make readings of scenarios, vigour in positioning the institution in the centrality of the Marist mission” (AU Marist Leader 12). For AU Marist Leader 21, the formation should guarantee an “acquisition of the necessary tools to establish deep human relationships from the intercultural, interreligious, ecumenical aspects”. The same line of thought was developed by AU Marist Leader 22, who added the need to work on leadership development in terms of “conflict resolution and communication skills; generative dialogue; discernment, both personal and communal”.

Participants also related the need for *better defining the profile of the Marist leader* to this category. For AU Marist Leader 20, the profile of Marist leadership should focus on the following Marist principles and characteristics:

the founding principle that “to educate a child you must love them and love them all equally”. The particular characteristics: simplicity, presence, love of work, in the style of Mary and family spirit and last but not least the values proper to our community: humility, simplicity and modesty.

AU Marist Leader 31 emphasised that another key element was “to generate this new charismatic style of animation and government is a concrete way of exploring a new land and an important factor of renewal”. For AU Marist Leader 14, leadership profiles must contemplate “service, personal consistency, respect for human dignity, capacity to listen and creativity”.

Therefore, in the view of research participants, the formation of leadership should direct the development of explicit or hidden abilities of a human, personal, relational, charismatic, institutional, spiritual nature and pertaining to the mission. In relation to this, Sindell and Sindell (2015, 20) state that:

as a leader or aspiring leader, you must continuously call upon all of your traits. Of course, in certain circumstances, different traits will need to be leveraged. . . skills can be

developed, morphed, or even transformed. . . . You should be constantly reflecting on the skills you want to develop.

For the development of skills to be effective, it “requires an exhaustive understanding of the ideas and the major concepts that underlie its goals and directions” (Lafortune and Lepage 2009, 11). In this sense and as expressed by participants, the need for a continuous and planned process of strengthening the development of leadership skills becomes evident.

e. Strengthening Formation Processes

The fifth category was that of strengthening formation processes, with 29 references and four subcategories: strengthening the formation programmes of Marist leaders (19), articulating theory and practice (13), responding to emerging themes (10) and ensuring the allocation of necessary resources (2).

According to AU Marist Leader 18, “the formation of a Marist leader has to be integrated into a process of formation. It cannot be something punctual or random. It has to be a proposal made to people with a Marist background”. In the opinion of AU Marist Leader 5, leadership formation processes should provide “common spaces of formation and specific spaces (e.g., according to the role that the person plays in a work. . .) or within the Institute (Brothers, laypeople, single, married, with children, etc.)”.

Strengthening the formation programmes of Marist leaders is a strategic foundation for formation processes. To be more effective, some participants said they should ensure the development of innovation and planning (9), ensure holistic and theological training (5), have legal recognition by a higher education institution (2), and be more inclusive (2). According to AU Marist Leader 30, formation programmes should foster the “development of creativity, the reading (analysis) of reality in order to give adequate and adapted answers”. For AU Marist Leader 40, they should be “contemporary—not focussed on history so much as on the current realities”.

Regarding articulating theory and practice, AU Marist Leader 28 espoused that formation processes should ensure “harmony between theoretical learning and experiential learning”. For AU Marist Leader 6, these processes should grant “attention to the needs and appeals of children and young people” to respond to emerging themes currently facing the world. AU Marist Leader 49 suggested that “we need to share resources more freely for the benefit of all”, emphasising that the Institute should ensure

the allocation of necessary resources for the proper development of leadership formation processes.

The strengthening of formation processes could therefore be considered an important challenge when developing the formation of prophetic and collaborative leaders who can guarantee the continuity and vitality of the Marist charism. For Michael Green (2018, 174), these processes must be ensured in a normal way, in leaders' daily lives, and contemplate their family, community, social, professional and personal spheres. Likewise, research participants attested that leadership formation programmes should be intentional, with clear and defined processes, as well as specific target audiences. They should contemplate leaders' integral development, contribute to responding to emerging issues and, based on Marist values and principles, contribute to the development of Marist leadership for today's world.

f. Preparing New Leaders

The last category was *preparing new leaders*, with 5 references. Although little mentioned, this aspect is essential for the renewal of institutional leadership frameworks and to ensure that the charism can be passed on to Marist leaders from generation to generation, without forgoing the specificities of each historical moment.

According to AU Marist Leader 11, it was important to “to establish a process of detection and attraction of leadership and to form it adequately (to prepare leadership with clear intentionality)”. AU Marist Leader 42 confirmed this idea, stating that the Institute needs to “properly identify Marist leaders with discernment and consultation, both Brothers and Lay”. The thoughts of these two leaders were complemented by those of AU Marist Leader 49, who added that it was also urgent to “create opportunities to identify and support our future leaders in remote areas, especially third world countries”.

According to Mathis and Roueche (2013, 5), “identifying and preparing the number of highly skilled professionals to replace retirees will be daunting. However, it also offers an unprecedented opportunity to infuse new competencies and fresh thinking into the way our colleges do business”. In this sense, when talking about the process of attraction and formation of new leaders, it is also important to consider preparation processes for leaders who are nearing the end of their career in such a way that they can finish their mission in the institution with serenity, recognition and gratitude.

Therefore, the process of attraction and leadership formation must focus on leaders' entire cycle within the institution, beginning with their arrival and continuing throughout the entire period of operation until they complete their mission. This process must be conscious, planned and communicated to ensure a harmonious transition for both leaders and the institution, regarding leadership roles. This will allow Marist leaders to transcend the professional dimension of their commitment to the Marist charism, allowing it to become a proper life choice.

6.7 CONCLUSION

The contributions of participants presented throughout this chapter regarding their perception of current leadership formation programmes and their understanding of what constitutes a global, prophetic and collaborative leader have allowed an in-depth analysis of the role of the General Council as the global leader of the Institute of the Marist Brothers, and the Council's role in ensuring the formation of prophetic and collaborative leaders. Thanks to participating Marist leaders of the Administrative Units' contributions, it was also possible to identify their perspective on the strengths, challenges and key elements for processes of leadership formation that can contribute to the continuity and vitality of the Marist charism. The results and findings of this analysis of quantitative and qualitative data, collated via an on-line questionnaire, are fundamental for the validation and corroboration of the qualitative findings carried out with the members of the General Government and collected through interviews, which will be presented in the next chapter.

CHAPTER SEVEN

THE VISION OF THE GENERAL COUNCIL ON THE FORMATION OF LEADERS COMMITTED TO THE CONTINUITY AND VITALITY OF THE MARIST CHARISM

7.1 INTRODUCTION

As in chapter six, which presented the results of the quantitative and qualitative data analysis of the responses to the online questionnaire of 57 AU Marist Leaders collected through Survio, an online survey tool, this chapter explores the qualitative data collected through semi-structured face-to-face interviews, with the objective of analysing the role of the General Council of the Institute of the Marist Brothers as a global leader in ensuring the formation of prophetic and collaborative leaders. In addition, the chapter aims to identify the current strengths, challenges, and opportunities for Marist leadership formation processes which are committed to the continuity and vitality of the Marist charism. The analysis is from the perspective of the members of the General Council of the Institute of the Marist Brothers. The findings of the interchange dialogue between the themes that arise from chapters six and seven which respond to the problem of this research and its objectives are presented in the chapter eight.

Eight global leaders from the Institute took part in the face-to-face interviews. They all reside at the Marist Brothers' General House in Rome, Italy. Interviewees included the members of the General Council: the five General Councillors, the Vicar General and the General Superior. The General Bursar, who has charge of the finances of the General Administration and of the administration of the goods of the entire Institute, also participated. All eight participants were Marist Brothers and have been identified throughout this chapter as Global Marist Leader 1 through 8 (GML18). The interviews were conducted in two languages—six of them in English¹³ and two in Spanish. All interviews were recorded and transcribed. A total of 48 hours of interviews resulted in a transcription of 98 pages. It should be noted that the transcripts of the two interviews conducted in Spanish were subsequently translated into English. The analysis of the interviews was carried out with the support of NVivo Software (version 12.6.0), as this

¹³ Among the participants only two are native English speakers.

technology favoured a deeper and more detailed understanding of qualitative data through the use of mixed methods.

This chapter is divided into seven thematic sections. The first section introduces the participants' profiles. The second session presents the essential elements for building participants' leadership profiles. The third section considers the Institute's global leaders' perspectives on the strengths and limits of current Marist leadership formation. The fourth section explores the strengths and challenges associated with the leadership formation processes' capacity to respond to the calls of the Institute's 22nd General Chapter. The fifth section examines the role of the General Council in attracting and forming Marist leaders, while the sixth section investigates the place and role of the laity and the Marist Brothers in Marist life and mission. Finally, the last section presents the global Marist leaders' considerations for the formation of prophetic and collaborative leadership committed to the continuity and vitality of the Marist charism.

7.2 PROFILE OF THE PARTICIPANTS

In this section, the demographic data characterising the profile of the interview participants will be presented.

The nationalities of the eight interview participants were as follows: one was from Madagascar, one from Mexico, one from the United States of America, one from Colombia, one from Australia and three from Spain. Regarding the age of the participants, two were in the 45-55 age bracket and six participants were in the 56-65 age bracket. Five interviewees studied in Marist schools before entering the formation process to become Marist Brothers and three studied in public schools.

Of the eight interview participants, five have been Marist Brothers between 31 and 40 years, while the remaining three participants have been Marist Brothers between 41 and 50 years (Figure 24).

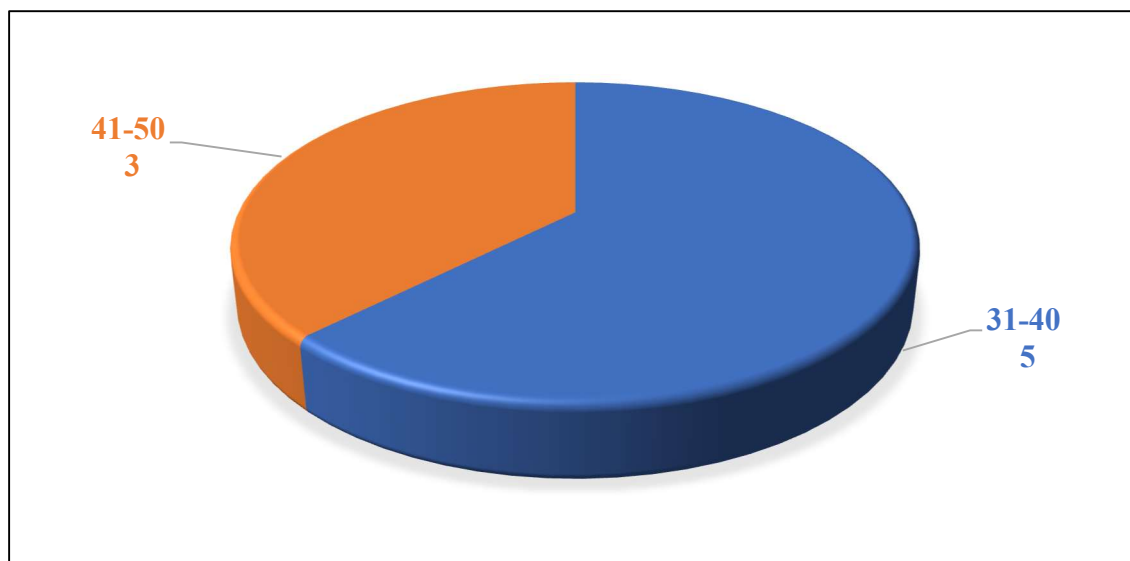


Figure 24. The number of years the participants have been members of the Institute of the Marist Brothers
Researcher's Source, 2021.

With respect to academic background, as presented in Figure 25, all eight participants replied that they held bachelor's degree, six held an additional master's degree, one had a professional diploma, and one had a doctorate. Those with bachelor's degrees obtained their degrees with studies conducted in the following disciplines: Religious Sciences (4), Theology (3), Psychology (3), Pedagogy (2), History (2), Mathematics (1), Linguistics (1), Social Sciences (1), Arts (1), Philology (1) and Philosophy (1). Those with Master's degrees obtained their degrees with studies conducted in the following disciplines: Education (3), Theology (2), History (1) and Counselling (1). The professional diploma holder studied Educational Leadership and Administration. Finally, the doctorate holder studied Education.

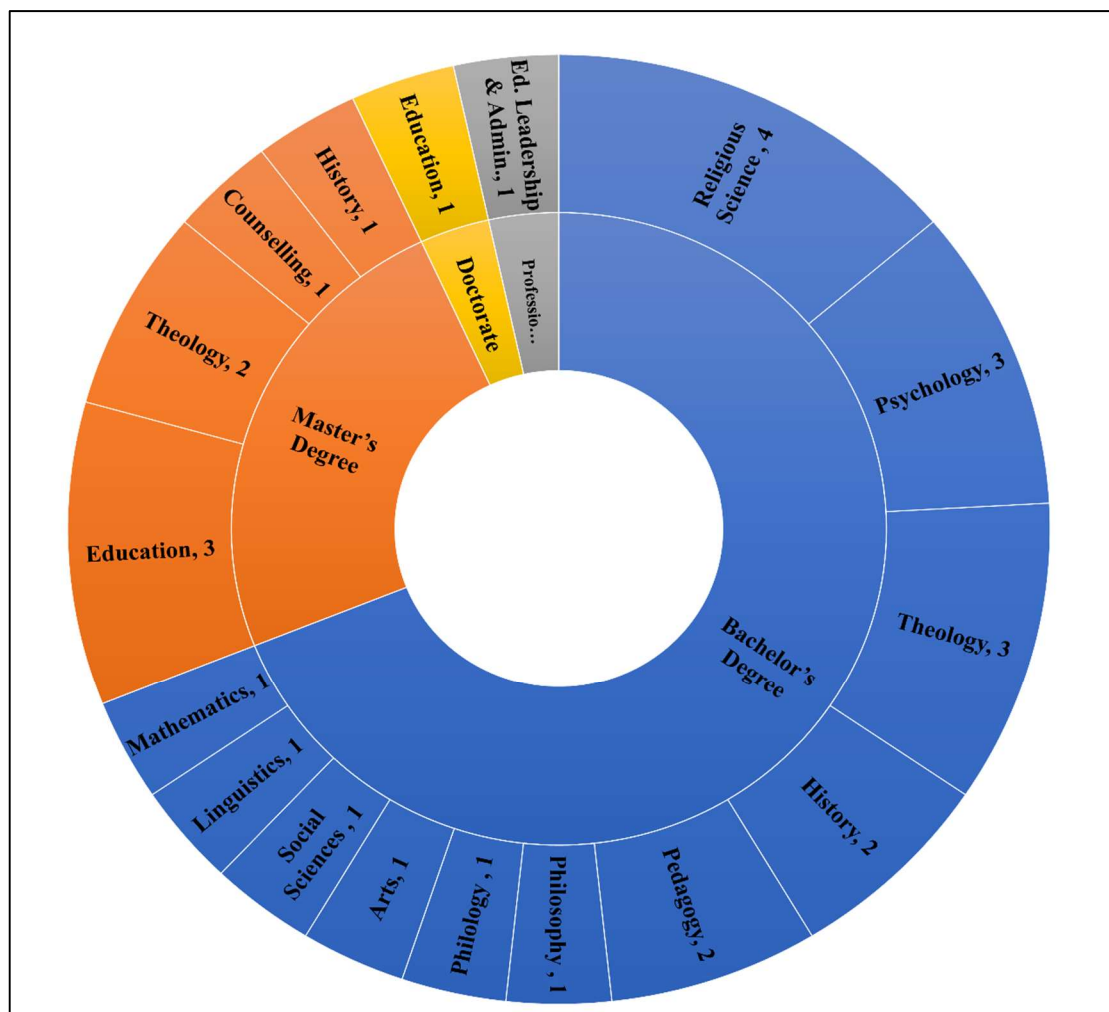


Figure 25. Academic Background of Participants

Researcher's Source, 2021.

Figure 26 presents the participants' religious, Marist and spiritual formation. All eight participants stated they had received their religious formation during the process to become Marist Brothers. In addition, four participants stated they had completed a course in Religious Sciences, another four had completed courses in Theology and one participant a course in Pastoral Theology. Regarding their Marist formation, four participants responded that they had entered the Juniorate, a secondary school for those interested in pursuing religious life, and all eight participants stated that they had entered the various formation programmes required to become a Marist Brother: the Postulancy, the Novitiate, and the Scholasticate. Two participants responded that they had participated in a course to become formators of future Marist Brothers. All eight participants confirmed they had also received spiritual formation during their formation process to become Marist Brothers.

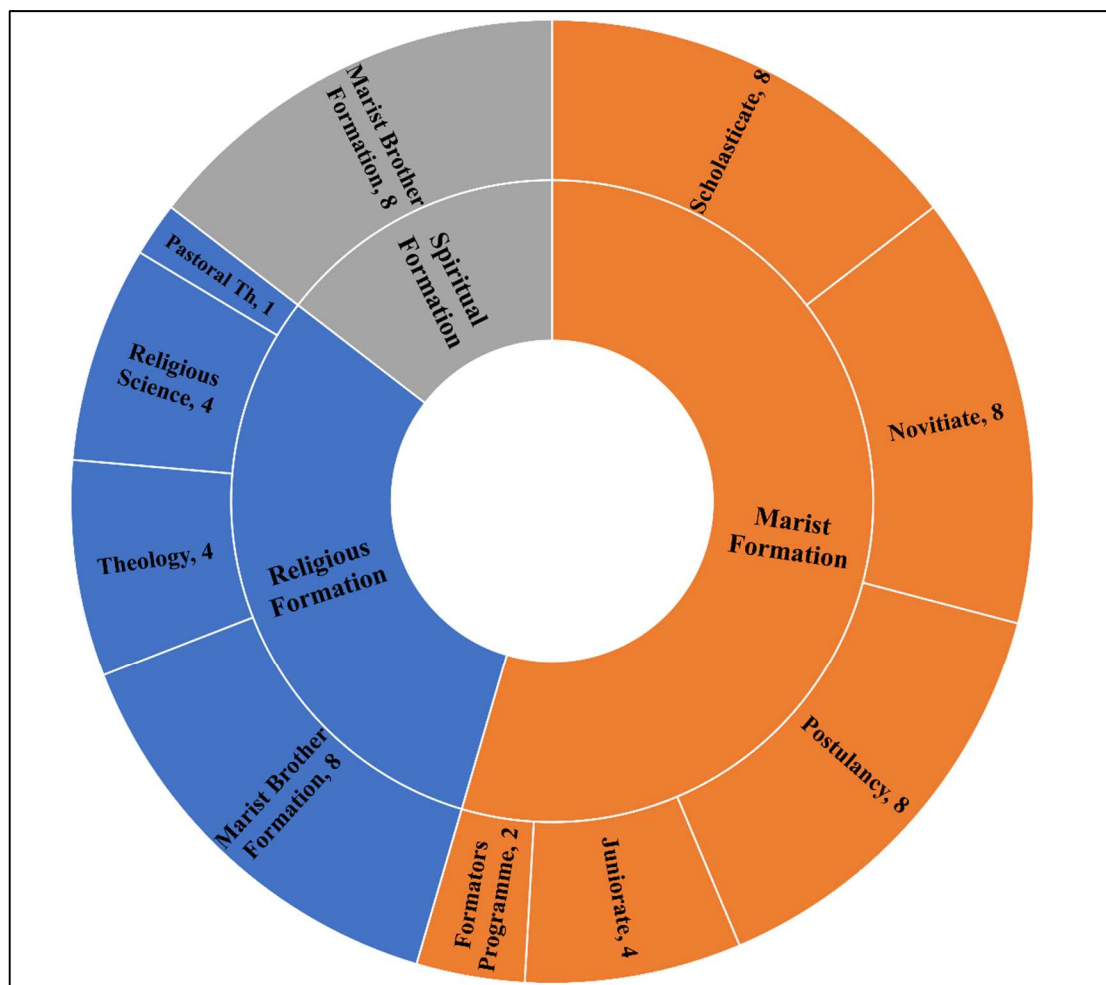


Figure 26. Religious, Marist and Spiritual Formation of the Participants
 Researcher's Source, 2021.

Regarding the participants' professional experience prior to assuming their mission as global leaders of the Institute in 2017, all eight participants reported that they ministered in Marist educational works and had served at the leadership level of their Administrative Units (Figure 27). In addition, three participants reported having worked at the global level of the Institute and three participants in Marist Formation Houses for future Marist Brothers. Finally, three participants reported developing other activities at the regional level or with other organisations linked to the Institute.

With regard to experience working in education, all interview participants reported having taught in primary and/or secondary schools; two had worked as teachers in universities; six had developed religious school activities; four have served as a school principal, two as school administrators, two as coordinators of youth ministry, and one as a catechist.

Regarding the participants' work in Province administration, seven participants exercised the role of Provincial and seven that of Provincial Councillor; seven participants served as Community Leader, six as Vice-Provincial, two as Youth Ministry Coordinator, two as Vocation Ministry Coordinator, one as Education Department Coordinator and one participant worked in services connected with the Provincial Secretariat. Concerning services linked to the Institute, two participants served as General Councillors in the previous administration, one as the coordinator of the Bureau of Vocations, and one as a member and coordinator of the International Brothers' Formation Commission. One participant currently serves as General Bursar.

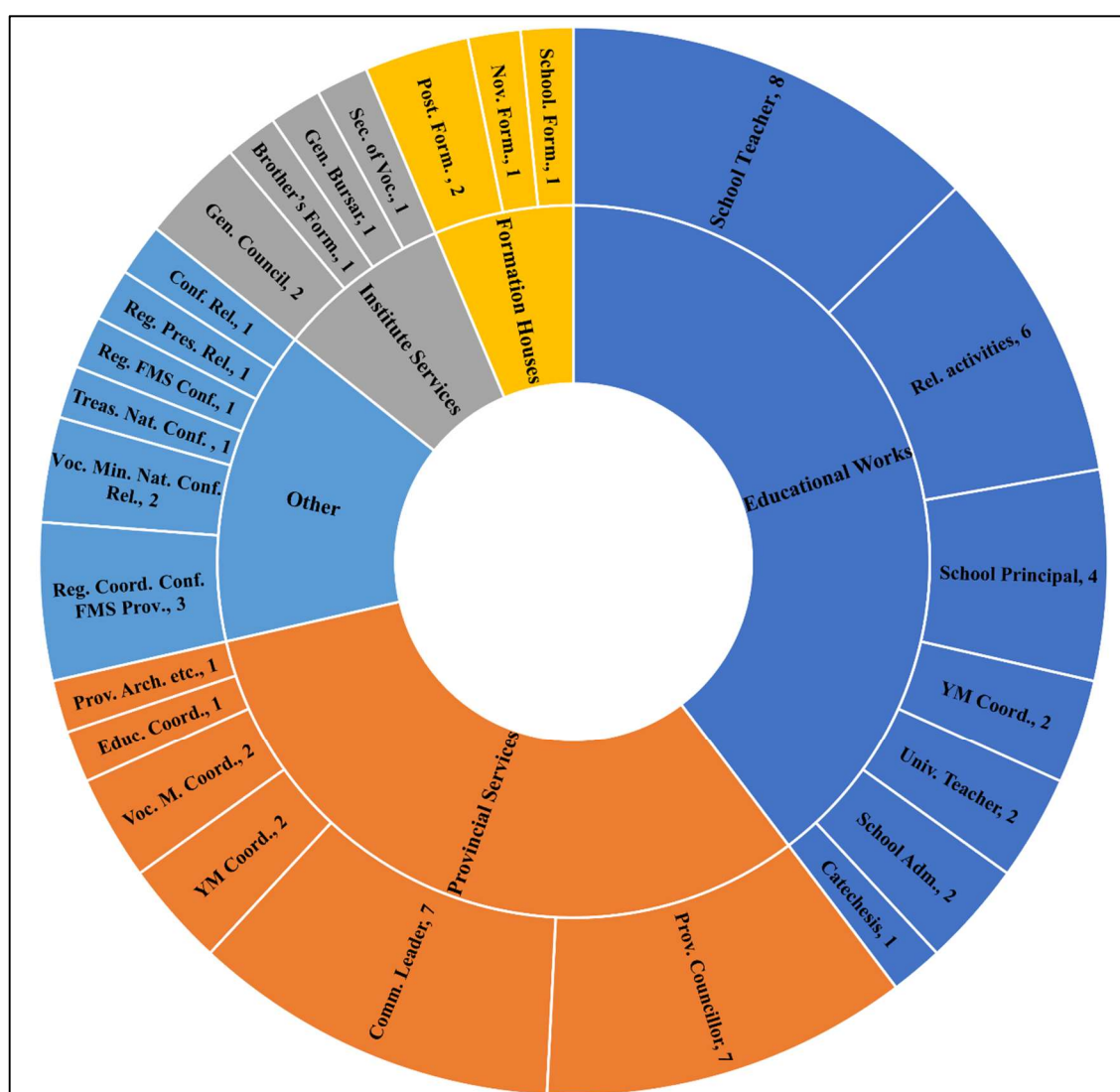


Figure 27. Participants' Professional Experience
 Researcher's Source, 2021.

A few of the interview participants served in Marist Formation Houses: two as formators in the Postulancy, one in the Novitiate, and one in the Scholasticate. Regarding work at the regional level or with organisations linked to the Institute, three were Regional Coordinators of Conferences of Marist Brother Provincials, two were Vice Presidents of National Conferences of Religious, one had been Regional President of Conference of Religious, one was Vocation Ministry Team Member of National Conference of Religious and one was Treasurer of National Conference of Religious.

7.3 THE ESSENTIAL ELEMENTS IN THE FORMATION OF MARIST GLOBAL LEADERS

The aim of this second section is to present the elements that Marist global leaders consider essential to the formation of their leadership (see Figure 28). Five categories emerged from the interviews: *Leadership Formation*, *Leadership Practice*, *Leadership Mentoring*, *Leadership Personality Development* and *Example of Previous Leaders*.

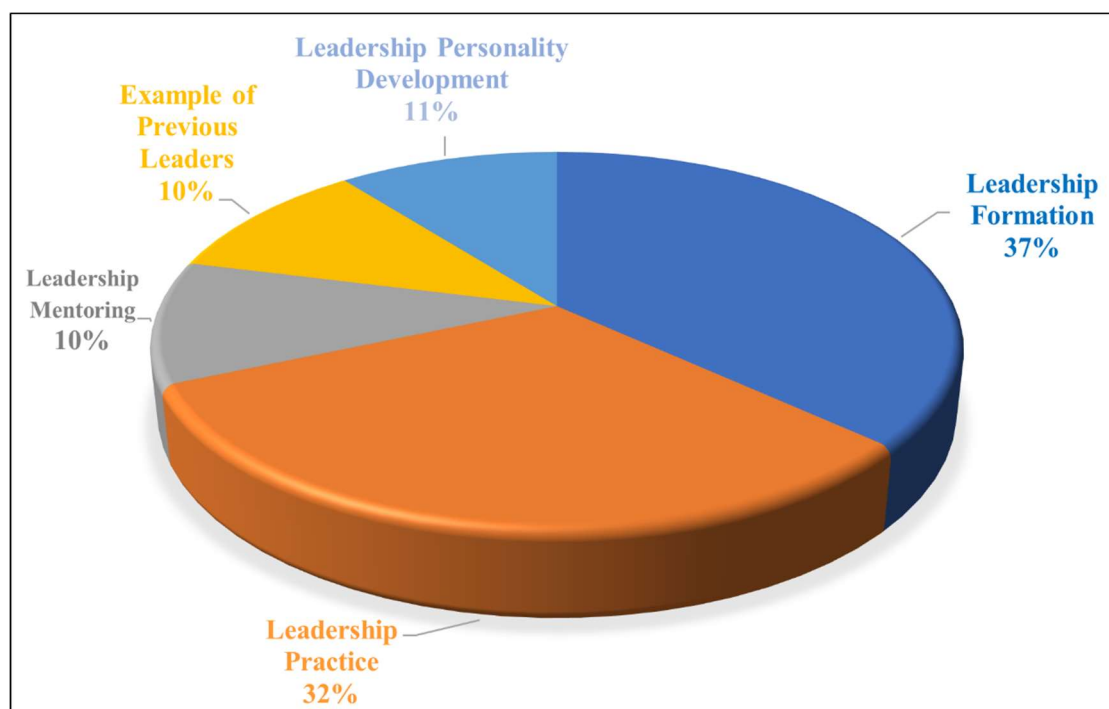


Figure 28. Essential Elements in the Formation of Marist Global Leaders
Researcher's Source, 2021.

7.3.1 Leadership Formation

The first category mentioned by participants which will be analysed was that of *leadership formation*. Subcategories mentioned were the *Marist charism formation*, the *Gospel of Jesus Christ* and the *exchange of leadership experiences*.

Even though participants admitted that the specific leadership formation they received was limited, they also recognised that various other opportunities they had been afforded were crucial to their leadership development. Global Marist Leader 4 said: “from an academic formation standpoint, I am not an expert in leadership. However, I have been fortunate to have had courses during my time in university in leadership, pedagogy, and accompaniment”.

Similarly, Global Marist Leader 8 recounted:

I had little moments in leadership formation that were really helpful for me, in terms of: How to be open to diversity? How to create teamwork? How to be more like the one that’s helping the others to become leaders as well, rather than just be “the star”? It is a different concept—to help everybody really to give the best of himself.

Such formative experiences received by Marist global leaders were not part of a specific leadership formation programme, but rather part of academic formation programmes and other intermittent courses promoted by the Institute which also contributed to the development of their leadership.

Within these formative experiences, the participants highlighted the *formation in the Marist charism*, the *foundation of leadership in the Gospel* and the *exchange of experiences on leadership* as important elements in their own development as leaders. For Global Marist Leader 5, formation on the Marist charism was fundamental for his leadership. He stated that “at the same time that you are discovering yourself, you are experiencing values and you are living a spirituality in community”. Likewise, Global Marist Leader 1 mentioned that it was important for his formation and development as a Marist leader “to have some rootedness or foundation in the gospel of Jesus Christ and looking at what Jesus would do in certain situations”.

With regards to the exchange of leadership experience as a result of different formative processes promoted by the Institute, Global Marist Leader 3 stated, “I attended those meetings and especially the General Conference in Colombo, Sri Lanka, in 2005. For me, the sharing with the other provincials their experiences as leaders gave me more confidence in my role as leader”.

For Ercico *et al.* (2016, 2), “leadership development must be approached in a holistic way, embracing the whole human resource management process”. Leadership development should be a deep and continuous experience of learning and self-knowledge. Therefore, leadership development programmes must be structured so that by developing their skills, leaders can discover the best of themselves and the best ways to inspire and contribute to an organisation in the achievement of its mission.

7.3.2 Leadership Practice

The participants identified *leadership practice* as the second essential category for the development of their leadership skills, reporting that in addition to the formative experiences in which they had the opportunity to participate, actually practicing leadership in various contexts of Marist life and mission was essential to their development as leaders.

Global Marist Leader 2 affirmed that “any formation I had in leadership came from the experience of first being a teacher in high school, then taking on other, lower level leadership roles within those schools”. For Global Marist Leader 4, the practice of leadership was a complementary element to his formation, recounting that:

all this has been combined with experience. I was very young (only 27) when I was appointed to the Provincial Council in my Province. From that moment, I was part of a team that was leading some aspects of the life of the Brothers and of our Marist schools.

In the same way, Global Marist Leader 6 observed that “one thing is the theoretical part of the training, but the more important element is to be put in a place where you can really act as a leader, where you can see that things can go well, and that you can feel supported”. From this participant’s perspective, practice not only assisted in the development of his leadership abilities, but it became the very essence of the way to exercise it.

Some experiences were cited as examples of leadership practice. Global Marist Leader 2 referred to “things like being the coordinator for our year group. Then being a subject coordinator, eventually being Deputy Principal and then Principal of a school”. However, the experience most cited by participants was working with groups of young people as part of the Marist Youth Ministry. Global Marist Leader 6 stated, “I participated

in a process that we call ‘REMAR’¹⁴. . . it was created in Colombia by a Brother and the main purpose of this movement is to form and train young leaders for the future”.

The vision of developing leadership skills through practice is in line with Raelin’s thinking (2016, 3) which identifies that “leadership occurs as a practice”. According to Raelin (2016, 4), “the practice of leadership is not dependent on any one person to mobilise action on behalf of everybody else. The effort is intrinsically collective”.

For Global Marist Leaders, practice aligned with formation was a key element for developing their leadership. As interview participants themselves mentioned, practical experience with groups of young people in the Marist Youth Ministry enabled them to take on other responsibilities in Marist educational initiatives, which in turn helped them to get to know themselves better, to gain confidence, seek knowledge, and develop the skills necessary for the exercise of leadership. Therefore, while practice has contributed to the development of their formation as leaders, it is also understood as a form of leadership in itself.

7.3.3 Leadership Mentoring

Leadership mentoring was the third category identified by participants as being essential for the development of their leadership, given that it consists in the accompaniment of leaders—most especially at the beginning of their careers—by other more experienced leaders. Global Marist Leader 2 stated that “all my leadership formation happened through the experience of learning to lead by practicing leadership and having older Brothers, not just Brothers, but older people work with me to help me learn how to be a leader”.

Both individuals and leadership teams can provide this accompaniment. For Global Marist Leader 4, both Brothers and laypeople have accompanied his leadership trajectory in an individualised way, as well as through work teams. According to this leader:

I can say that a very good thing I have in my life is that very often my leadership has been accompanied by somebody. By one team, of course, most of my leadership has always been a teamwork, but also, I had some Brothers or Laypersons as reference that helped me and accompanied me in my leadership.

¹⁴ The REMAR Movement is a Marist Youth Movement created in Colombia in 1976 by Brother Nestor Quiceno to train young leaders.

Global Marist Leader 6 emphasised that trust received from more experienced leaders was a key element for his accompaniment process. For this leader, the proximity and trust of such leaders was instrumental in developing maturity and trust in exercising his own leadership. He stated “I think trust is a very important issue in leadership, and it’s essential to have, in some way, mentors—that is to say, people that you know are great leaders in the institution where you are”.

The personalised accompaniment of new leaders, in this case of the Marist Brothers, was a top priority for the founder of the Institute of the Marist Brothers. According to the document *In the Footsteps of Marcellin Champagnat*:

Marcellin showed personal interest in each one of his young Brothers, guided them spiritually, encouraged them to become qualified, and entrusted them with apostolic responsibilities. He visited their schools and accompanied each Brother in his mission as teacher and catechist. (The International Marist Education Commission 2007, 25)

The mentors cited by the Global Marist Leaders are Marist leaders with highly significant trajectories in Marist life and mission. Based on their experience of leadership and formation, they have supported other Marist leaders early in their careers. They contributed substantially to creating a favourable work environment for the new leaders and, above all, to sharing knowledge and experience.

For Nelsey and Brownie (2012, 201), “mentoring requires a commitment from both the mentor and mentee: it is based on mutual trust, teaching, coaching, counselling and friendship”. As such, Leadership Mentoring can be understood as an essential element associated with the formation and practice of developing the Marist leadership tradition.

7.3.4 Leadership Personality Development

The fourth category identified by the participants was *leadership personality development*, referring to each individual’s natural leadership skills or talents which mature over time and through formation programmes and leadership experiences.

In this sense, Global Marist Leader 7 expressed that:

There is an element that is human there and it doesn’t depend so much on my training as a Brother, but almost on personality. There has been a certain capacity for leadership that, in some way, has always manifested itself, since I was a very young boy, in any context.

According to Global Marist Leader 6, it was necessary to “first of all, become yourself. This means you will be a leader with the qualities you have as a person”. This same leader completed this line of thought by reflecting:

I think the first thing was to discover more about me, about my qualities, about my skills to communicate, to listen. . . and I think all these different tools, or the skills I was developing, allow me now, or have allowed me throughout my life, to better understand what leadership is about.

According to Beckhard and Dyer (1991) and Churchill and Hatten (1987), “the personality characteristics of a leader, along with his or her skills, may determine the success of a business” (in Stavrou *et al.* 2005, 191). For this reason, it becomes essential that formative processes provide leaders with opportunities to develop their self-knowledge and their natural abilities.

In developing the leadership skills of the first Marist Brothers, Marcellin Champagnat undertook a great effort to provide an ongoing formation, since he believed that such formation could contribute both to the development of the Brothers’ personalities and of the necessary skills for exercising their mission. Corroborating this statement, the Marist education document, *In the Footsteps of Marcellin Champagnat* espouses that “Marcellin developed a system of ongoing professional development, which involved both theory and practical experience and was community-based” (The International Marist Education Commission 2007, 25).

Thus, for participants *leadership personality development* is an essential element for their formation as leaders and has enabled them to better incorporate the development of skills inherent to their personalities in their leadership approach, thus contributing to the mission entrusted to them.

7.3.5 Example of Previous Leaders

The fifth category was the *example of previous leaders*, referring to both Brothers and Lay Marists, who by virtue of their wisdom, style and leadership skills have become models or examples for new leaders.

Global Marist Leader 5 expressed his view of these leaders in this way:

I think that for me a very important part was, first, the contact with people, especially Brothers, who have been an example of a very strong witness leadership. Brothers for whom I feel and have felt admiration. Some have already died, others are still here, but

they have motivated us to live and act consciously and to give the best of ourselves. And I believe that this presence, seeing this reflected in them, is a force that inspires you, that inspires me. It inspired me.

Previous leaders have a crucial role, most especially for leaders who are beginning their mission. The importance of the role of *previous leaders* is also highlighted by Saint Paul when he writes to Timothy: “Don’t let anyone look down on you because you are young, but set an example for the believers in speech, in conduct, in love, in faith and in purity” (1 Tim.4:12). Thus, a leader’s lifestyle and leadership style become standards for others to follow, as he/she generates inspiration and confidence.

According to Global Marist Leader 5, presence is an important element that characterises the leaders who have served as his example. Unlike *leadership mentoring*, which has a closer and more pre-planned role in accompanying new leaders, the simple presence and testimony of *previous leaders* became a source of inspiration and guidance. For the Institute, presence a key pedagogical element: “We educate above all through being present to young people in ways that show that we care for them personally” (The International Marist Education Commission 2007, 25).

In view of this, presence can also be considered an educational element for the formation and development of new leaders. When coupled with the testimony of the life and example of previous leaders, presence gives new leaders points of reference that can contribute to their own action and development.

The elements of *leadership formation*, *leadership practice*, *leadership mentoring*, *leadership personality development* and the *example of previous leaders* were deemed by the Global Marist Leaders essential for their formation and development as leaders.

7.4 THE STRENGTHS AND LIMITATIONS OF MARIST LEADERSHIP FORMATION

The aim of this section is to show the strengths and limitations of Marist leadership formation according to the Global Marist Leaders. In Table 6, these perspectives are presented with the respective number of Global Marist Leaders (GML) who mentioned them.

Strengths		Limitations	
Category	# GML	Category	# GML
Decentralised Formation Programmes	6	The Lack of a Leadership Development Plan	7
Building a Common Vision of the Marist Charism	5	Building Leadership Capacity	6
Greater Formation of Leaders	5	The Quality of Leadership Formation Programmes	5
Accompaniment of the General Government	5	Weak Leadership Accompaniment	4
Accompaniment of the New Leaders	4	Difficulty to Change Mindset	4
A New Understanding of Leadership	4	Co-responsibility Among Brothers and Laypeople	3
Sharing Best Leadership Practices	2	Availability of Human and Economic Resources	3

Table 6. Strengths and Limitations of Marist Leadership Formation
Researcher's Source, 2021.

7.4.1 The Strengths of Marist Leadership Formation

The question asked of interviewees was: “What do you think are the current strengths of the formation for Marist leaders?”

Interview participants' responses allowed for the identification of seven different relevant categories: decentralised formation programmes, building a common vision of the Marist charism, greater formation of leaders, accompaniment of the General Government, accompaniment of the new leaders, a new understanding of leadership and sharing best leadership practices.

a. Decentralised Formation Programmes

Global Marist Leaders identified *decentralised formation programmes* as an important element in the formation of Marist leadership. In their view, decentralised programmes are different from those promoted by the General Government of the Institute of the Marist Brothers, since they take place as part of the scope of the Administrative Units and the Marist Regions, thus favouring greater synergy for the formation of leadership skills. Some of these courses for leaders are developed in partnership with other institutions.

Global Marist Leader 2 highlighted the quality of the Marist leadership formation programmes at the level of the Administrative Units:

Many Provinces have good programmes, courses in leadership in helping to identify good leaders, helping to ensure that good young leaders, or good young people who are preparing for leadership, have access to good knowledge and good understanding of the charism.

According to this same leader, “Many of these courses are short courses; they are short programmes run by various province spirituality teams, leadership teams, education teams, those sorts of things. I think that’s very good”.

Global Marist Leader 1 referred to leadership formation programmes conducted in partnership with other religious institutions:

The Provincial, his Vice Provincial, some members of his Council would go to these workshops or these assemblies, so those would be opportunities for leadership development on that level. It wasn’t something that the Marist Brothers ran; it was the conference that ran it.

For Global Marist Leader 8, it was important to recognise that for some Administrative Units, leadership formation occurred mostly as part of initiatives oriented around education and Marist communities. He affirmed that “in other parts of the world, there is mainly the accompaniment of preparation for those who are headmasters, principals of schools, a little bit also in terms of community life”. Global Marist Leader 1 made a similar observation, recognising that “my experience has been that in the educational institutions, I think we do very good formation of both Brother and Lay in their roles and their capacities. . . I think we do very, very good work”.

Interview participants also singled out the formation conducted at the regional level. With regard to this, Global Marist Leader 4 stated that: “Even now at the level of Europe, of Marist Europe, we have very interesting courses of leadership. I can say that we have a serious formation programme, and this is another strength for me that I consider important”.

Formation initiatives in the Administrative Units and Marist Regions responded to the Calls of the 22nd General Chapter, which called for “identifying and forming leaders, Lay and Brothers, at all levels, in order to build up co-responsibility for Marist life and mission” (Institute of the Marist Brothers 2017, 13). Therefore, the Global Marist Leaders recognised that these decentralised initiatives contribute to the better formation of Marist leadership.

b. Building a Common Vision of the Marist Charism

The second category that global Marist leaders recognised as a strength for the formation of Marist leadership was *building a common vision of the Marist charism*. For the interview participants, the formation programmes were fostering a common understanding and deepening of the Marist charism. Participants also highlighted Marist spirituality as an important element of the charism that is being deepened through the formation programmes. Finally, participants recognised that this vision of the charism is shared by Brothers, laity and young Marists.

In the perception of Global Marist Leader 1, “the bulk of our gatherings or formation programmes are about building the gospel and charism development and charism formation. I think we do okay with that”. From this perspective, it is possible to affirm that the majority of the Institute’s formation programmes are focused on the Marist charism or on elements of it. In a similar manner, emphasising the experiential dimension of formation programmes on the charism, Global Marist Leader 7 reported:

The most important part [of our formation programmes] has been the experience or the coexistence of these leaders with, let us say, the Marist charism and with other Marists. Essentially, this has happened with the Brothers. Today, we are beginning to see that it is not only with the Brothers but also with the laypeople.

From its origins, the Marist charism has attracted and inspired people who go on to make it their life project, committing themselves to the Gospel and to the education and evangelisation of children and young people. According to the Marist tradition:

Many different people, men and women, Brothers and laypeople, have been attracted by his personality and charism. In living out their own vocation, they have come to identify themselves with his charismatic style of continuing the mission of Jesus. (The International Marist Education Commission 2007, 27)

Therefore, by promoting a consistent formation on the Marist charism, the Institute is ensuring that the Brothers and Lay Marists have an improved common understanding of the charism and can thus commit themselves to its transmission and vitality.

c. Greater Formation of Leaders

As a third category, interview participants recognised that the Institute was presently securing a *greater formation of leaders*. As evidence of the greater investment

in the formation of Marist leaders, participants cited the diversity of formation opportunities in the various institutional settings, academic and professional formation, the development of natural skills and talents, and the human and financial resources allocated to the formation of leaders.

For Global Marist Leader 4, “more and more in different areas of the Marist world, we have specific programmes for the formation of leaders”. This affirmation was corroborated by Global Marist Leader 6, who stated, “I think one of the things we have as a congregation is a good diversification—at least in some of the Provinces, and the Institute, for example”.

Other interviewees emphasised the Institute’s greater awareness and concern for promoting the formation of leaders, and in particular the formation regarding the Marist charism. This formation would in part complement the professional formation many leaders have suggested to the Institute. In this vein, Global Marist Leader 5 reflected that:

Today there is a greater strength and awareness of this at all levels to provide the Institute with people who are professionally prepared because many of them are already prepared in the professional field or have had previous experience that accredits them as such, but they need this other complement. I believe that little by little this complement is provided at this time.

The formation of Marist leadership has been an essential element since the foundation of the Institute. Br. Jean Baptiste Furet, one of the first Brothers, described the formation promoted by Marcellin Champagnat to the first Marist Brothers:

During the two months’ holidays, he often talked to the directors on the way the houses were to be governed, on the material administration and on the direction of the classes. In these talks, he gave great ply to the qualities necessary for a good superior and the way to obtain them; to the obligations of a teacher and of a Brother Director, and to the way these duties should be carried out. (1989, 452)

Clearly, the participants value the increased offer of formation for Marist leaders, because they see in it a real possibility of ensuring the knowledge and transmission of the charism for future generations.

d. Accompaniment of the General Government

The fourth category was the *accompaniment of the general government*. The participants understood this accompaniment to include the meetings of the Provincials, the extended meetings of the General Council by region and the General Council

members' accompaniment of the Administrative Units. This type of engagement has afforded the leaders the opportunity to share experiences and thus strengthen the Institute's international identity.

Global Marist Leader 2 revealed that “the work that the General Council does with Provincials is important, particularly where there are more significant issues to be dealt with—I think that is a positive experience in developing leadership”. Regarding the meetings and leadership formation programmes offered by the General Government, Global Marist Leader 1 affirmed that “it's helpful that we bring the Brothers here, try to engage them in real life situations, and see how they might respond”.

The accompaniment of Marist leaders occurs in different areas of the Marist life and mission, much like the functioning of the Institute itself. Global Marist Leader 6 recognised the value of this type of accompaniment, when he stated that, “I think we have different areas, such as the mission or finances, and while I recognise that we still have a lot to do, I think that we have good things that we are doing there”.

The responses of the Global Marist Leaders are in keeping with the priorities of the Institute for the period 2017-2025, which include “promoting close personal accompaniment on all levels” (Institute of the Marist Brothers 2017, 13). The greater this proximity and accompaniment, the greater the Global Marist Leaders' understanding of the Institute's realities will be, and the better they will be able to respond to the challenges that these realities present to them.

e. Accompaniment of the New Leaders

The *accompaniment of the new leaders* was identified by the Global Marist Leaders as a fifth relevant category, and it recognises the important steps the Institute is taking in the processes of attraction, formation and accompaniment of new Marist leaders. Some interview participants also said that the above processes are closely linked to the processes of preparing leaders to complete their mandate of leadership in the Institute.

For Global Marist Leader 4, the steps taken by the Institute over the past 15 years “has established a very serious process of selection and formation of leaders, and this is very good thing because we are aware of leadership and we are taking it seriously”. Correspondingly, Global Marist Leader 8 argued that:

There are opportunities, real opportunities for accompanying the future leaders, or those who are in leadership. For instance, at the level of our General Council, we are trying also to accompany all the Provincials over these past two years.

Global Marist Leader 2 further recounted that “we have a system in place at the moment where we do a lot of mentoring of young men and young women to become leaders”. According to this same leader, well-prepared mentors are essential to the successful accompaniment of newer leaders. He stated that “we understand the strength of mentoring young people into leadership and helping them grow in leadership by providing them with different responsibilities in their careers, but also having good mentors with them to talk with them, to help them understand leadership”.

According to Solansky (2010, 675), mentoring new leaders “is a commonly used method for getting people to improve leaders and understand their strengths and weaknesses by opening up to their mentors’ advice and expertise”. In this way, accompaniment processes provide new leaders with a greater understanding of their role and a greater maturity for their mission.

f. A New Understanding of Leadership

As a sixth relevant category regarding strengths of Marist leadership formation, the Global Marist Leaders identified *a new understanding of leadership*. According to the participants, over the years the Institute has broadened its understanding of leadership and its processes of formation and accompaniment. Interview participants suggested that the understanding of leadership today is much clearer for the entire Institute. Additionally, there is an emphasis on the formation and development of collaborative and servant leaders.

According to Global Marist Leader 4, “Presently in the Institute there is a clear notion about leadership. I think this is very important”. In addition, this new understanding of leadership is founded on collaboration and the service to others. For Global Marist Leader 5, there was “also a strength in learning to work collaboratively”. For this leader, the Institute “was growing in this way of working, where Brothers and laypeople work together around projects of mission and professional projects which helps to build our understanding of the Institute as a global charismatic family”. Likewise Global Marist Leader 4 expressed that “among us, the idea of leadership is a leadership that doesn’t mean power, but rather a kind of service”.

According to Global Marist Leader 2, “there are Brothers and laypeople at the moment who are doing a lot of academic research around leadership and what it means to be a Marist leader”. It follows that the new understanding of leadership is also the fruit

of research efforts conducted around the theme of Marist leadership. The new understanding of leadership by Global Marist Leaders is corroborated by Br. Emili Turú, when he reports that “as Brothers and as laypersons, we are not members of the hierarchy; we are not called to act as agents of the institution, but as prophets in the midst of the People of God” (2012, 39). Therefore, for interview participants, Marist leadership should be understood as a service to others, especially children and young people, and in collaboration with other leaders.

g. Sharing Best Leadership Practices

The seventh category identified by participants on this topic was *sharing best leadership practices*. Participants understood these best practices to include responding to challenging situations, initiatives undertaken in specific areas of expertise and formation courses developed for local leaders. The sharing of best practices usually happens in both formal and informal ways in meetings, gatherings and formation programmes for Marist leaders. According to the interviewees, an important consequence of these knowledge opportunities is the continuation of communication and exchange, thus contributing to the deepening of practices that are of interest to each leader.

Similarly, Global Marist Leader 1 described how “most of our leaders already have credentialed degrees in leadership, educational leadership. We sometimes share best practices at our meetings, so that might include some best educational practices”. For Global Marist Leader 6, it was important for Marist leaders “to have the possibilities of gathering and sharing good experiences. It is something they value the most. What someone is doing in one place can help in the process people are following in other different places”. Sharing best practices fosters leaders’ creativity and innovation, helping them to respond better to the mission entrusted to them. According to Kremer *et al.* “a key success factor that leads to creativity and innovation is knowledge sharing, which is the means by which employees get the most out of the accumulated knowledge in the organisation” (2019, 67). By sharing best practices and knowledge, Marist leaders have the opportunity to support and inspire one another to better respond to the challenges and opportunities of the Marist charism in the contemporary world.

7.4.2 The Limits of the Marist Leadership Formation

To identify the limits of Marist leadership formation, the following question was asked of interviewees: “What do you think are the current limitations of formation for Marist leaders”?

Based on the participants’ responses, seven categories were singled out on this issue: the lack of a leadership development plan, building leadership capacity, the quality of leadership formation programmes, weak leadership accompaniment, difficulty to change mindset, co-responsibility among brothers and laypeople and availability of human and economic resources (See Table 6 above).

a. The Lack of a Leadership Development Plan

Participants pointed out *the lack of a leadership development plan* as the first category representing the limitations of Marist leadership formation. For the participants, the Institute lacks a formal programme for leadership development. The main concern is focused especially on the formation of young leaders, as it was evident from the participants’ statements that the Institute is facing a leadership crisis for the main positions tasked with animating and governing Marist life and mission around the world.

Global Marist Leader 1 stated that he “never found that there was a formal type of programme to prepare leaders”. Corroborating this statement, Global Marist Leader 3 affirmed that “when you asked me for this interview about leadership in the Marist Brothers, my first impression is that—from my experience—is that there is no formal leadership formation that is very clear”. According to Global Marist Leader 6, the Institute “didn’t have a strategic plan for that. We have something for the Brothers, but more as a way of helping to review their journey, an old journey. But thinking on leadership—we need to develop a specific programme for that”. From Global Marist Leader 7’s perspective, “we are building the formation of leaders almost by accident. That is to say that it does not respond to a pre-designed plan that we have decided to promote for the leaders when there is nothing”.

For these participants, the lack of a leadership development plan directly impacts Marist life and mission, resulting in a subsequent lack of leaders who are prepared as successors current leaders. For Global Marist Leader 7, “the process of formation of leaders is left to the casual factor having a plan for leadership and for leadership succession is still an element that is not so clearly explained in the Institute”. Regarding

the outcome of the lack of a concrete plan for the development of Marist leaders, Global Marist Leader 8 explained that “in many places we need leaders; we really don’t have a good pool of people to choose from, and at the end we have to put someone, and sometimes without real preparation”. According to this participant, “sometimes we struggle to identify a leader that can really hold the internationality and the challenges of our time”. Another concern is the lack of preparation of young leaders who are already performing their duties. For Global Marist Leader 2, “the young men and women being put into leadership really don’t have enough experiential understanding of the charisma to value it in their own lives, so they don’t transmit it”.

Leadership development is a crucial element in many organisations around the world. Bruce (2005) understands leadership development well beyond formation and individual development programmes. For Bruce (2005, XIII), leadership development “should include a focus on the leader, follower, and the context in which they have been, are, and will be interacting”. Another aspect this author highlights pertains to natural leadership skills and skills that should be developed. According to Bruce, “if you believe that leaders are born, you will probably not develop your full leadership capacity” (2005, XIII).

Therefore, based on the participants’ contributions, it is possible to identify that one of the Institute’s great challenges is to define a leader development plan for Marist leaders, whereby leaders are prepared to respond to the realities of today’s world by foreseeing future issues. This plan should consider current leaders as well as those new leaders who need to be prepared. It is important that the plan also takes into account both the natural skills of the individuals and those to be developed and honed so that Marist leaders can respond with competence and authority to the mission assigned to them.

b. Building Leadership Capacity

Building leadership capacity was the second category under limitations discussed by the participants. They recognised the value of exploring how leaders’ lack of preparation can become an obstacle in dealing with issues such as management, decision making, building strategic vision and anticipating needs, as well as facing market competitors who have a purely economic interest in education and other bureaucratic issues such as regulations of the countries where the Institute is present. In this sense, the

interviewees believed that priorities include the development of knowledge, behaviours, attitudes and skills that will help leaders to be increasingly committed to their leadership.

For Global Marist Leader 1, “the training of a leader is to help an individual build the confidence to be able to make decisions. Given formation, given advice, etc. they ultimately make decisions”. According to this leader, “that’s what we hope to do when we’re training—if you’d like—leaders. To build the capacity for them to make informed, good decisions”. Likewise, Global Marist Leader 4 affirmed that “the way we usually conduct our leadership is in a shared, fraternal way, with a lot of dialogue. Sometimes this means that our processes of taking decisions are long and slow”.

Another weakness identified by participants was the lack of a leadership capacity when it comes to building a vision for the future and innovation of the Marist charism. Global Marist Leader 2 said: “I don’t think we have a vision of the future. We haven’t worked out yet what we want our mission to look like in the future”. Continuing his train of thought, this leader stated “we haven’t yet started to cope with this whole idea of innovation, of what we need to do to work with poor young people, young kids, not just poor, but kids on the edge. We haven’t articulated a vision yet”.

Regarding *leadership capacity*, Dimmock argues that “outstanding and successful leaders tend to do different things than their less effective counterparts, and even when the same things are done by both, the successful leaders do them differently from the less successful” (2012, 18). The need for institutions to promote capacity-building for leadership arguably becomes ever more urgent. For the Institute of the Marist Brothers, it is essential to ensure leadership capacity-building programmes to guarantee the vitality of the Marist life and mission, as inspired by the Marist charism, in all parts of the Institute. Therefore, efforts directed at *building leadership capacity* will notably allow the Institute to build a promising vision for the future of the Marist charism.

c. The Quality of Leadership Formation Programmes

The third category on the limitations of Marist leadership formation is *the quality of leadership formation programmes*. Participants found that the quality of the programmes currently offered does not fully meet the needs of Marist leaders. According to the participants, there should be a better balance between professional and charismatic formation, just like the balance between theory and practice. Participants also emphasised

the need for an increased availability of joint formation programmes between Brothers and lay Marists.

For Global Marist Leader 7, the formation of Marist leaders was “not in keeping with the need and reality”. Similarly, for Global Marist Leader 5, there was a “mixture of formation in the charism and professionalism that must be balanced because the mission cannot be done without the soul of the mission, which comes in part from the charismatic entity”. Global Marist Leader 6 spoke about the need “to combine technical skills and the way you think in the congregation. Because what we need to help in this process of leadership is to understand how to help people in order to make them available to achieve the goals that the Institute has”. According to Global Marist Leader 7, “In our formation, we always have the tendency to take basic elements that serve us, but then in actual practice, we see the limitations”.

Leadership programmes should help leaders influence people to carry out their assigned mission. For Hibbert:

this means that leadership cannot simply be about the exertion of influence but should also involve accepting influence from others to develop a better understanding and more thoughtful direction. For this bidirectionality to be enacted, the process of formation (and leading) is built up through dialogue. (2017, 607)

As such, it is arguably urgent for the Institute to improve leadership formation programmes so that leaders are adequately prepared to respond effectively to the challenges of the present, and to project the future of the Marist charism and guarantee its vitality and continuity.

d. Weak Leadership Accompaniment

Global Marist Leaders considered *weak leadership accompaniment* as another limitation to the formation of Marist leaders. Participants considered the lack of accompaniment at the level of the Administrative Units as a factor, as well as the accompaniment of leaders participating in international formation programmes. The latter were not adequately accompanied when they returned to their respective realities, and thus could not properly put into practice the formation received abroad.

The limitation pertaining to the accompaniment of Marist leaders was a cause of great concern for global leaders. Global Marist Leader 8 suggested that “the follow-up of those leaders in some parts of the Institute can be weak. Probably in others it is OK; they

gather more frequently. I know Provinces that evaluate more frequently, but I think this is only a few Provinces”.

The lack of accompaniment for Marist leaders upon their return to their respective Administrative Units from international formation programmes is a related challenge that was mentioned. According to Global Marist Leader 3, “when we have international formation, we usually send two Brothers from each Province. But, when they go back to the Province, the skills they learned from the programme are not used to train the local leaders”. This same leader stated that “it is a bit limited to spread, and to take what is learned in an international setting to train the local leaders”. Global Marist Leader 6 added, one of the reasons for this is that “sometimes we give training for people, and sometimes when they go back to their Provinces, to the local realities, they are not put exactly in the right place in order to exercise what has been learned”.

Ensuring proper accompaniment of leadership contributes to the transformation of the institution. For Lafortune and Lepage (2009, 1), “the accompaniment process fosters discussion and comparison of how the change is viewed, thereby helping to construct a shared vision of the change to be implemented”. The accompaniment process entails an openness and acceptance for a path of growth and personal transformation. In this sense, Paul (2004, 308) explains that “accompanying means to join with someone and go where this person goes, at the same time”. According to Lafortune and Lepage (2009):

Accompaniment leadership is an influencing process leading to a change that will be felt everywhere, including in professional practices. It is exercised and develops through individual and collective reflection and through interaction with accompanied staff to foster awareness that leads to changes in action. (2009, 23)

Therefore, overcoming any limitations currently impinging on the accompaniment of Marist leadership represents an important challenge for Global Marist Leaders. According to the interview participants, there is an evident need to accompany Marist leaders to ensure a common vision of the charism, which responds collectively and creatively to the challenges imposed by the present context.

e. Difficulty to Change Mindset

The fifth category identified by interview participants was the *difficulty to change mindset*. Global Marist Leaders found a number of factors that compromise the

development of Marist leadership. These include excessive dedication to work, especially on the part of consecrated religious peoples, a certain resistance to accepting the co-responsibility of Brothers and lay Marists, and a lack of openness to experiences and partnerships with other external organisations for developing formation programmes.

According to Global Marist Leader 1, “one of the limitations is a limitation of the Brothers mindset. We [Marist Brothers] sometimes view the lay leaders through the lens of workaholism”. This leader explained that this does not mean that “laypeople can’t be workaholics, but they have other demands, other responsibilities, other relationships that demand as much time as say a ministerial position would”. He concluded by saying, “As Brothers, we are getting better with that, but to a limited degree. So, one limitation, if you’d like, is a mindset, a paradigm shift that we haven’t gotten to yet”.

Global Marist Leader 2 likewise expressed that “we seem to be caught in a mindset in some parts of the world that it has to be a Marist Brother who leads because it’s a Marist Brother school, and laypeople can’t lead it effectively”. Similarly, Global Marist Leader 4 reinforced a sensation of an excessive self-sufficiency on the part of the Institute when it comes to the formation of its leaders and stated: “I think we should be more open to go to other places and to receive external formation, because we have a lot to learn from the different institutions, experts, universities that would help us to have better formation in leadership”.

For Pope Francis, the change of mentality is fundamental for the revitalisation of the Church, as well as of institutions such as the Institute. Pope Francis expresses this sentiment when he says:

I dream of a “missionary option”, that is, a missionary impulse capable of transforming everything, so that the Church’s customs, ways of doing things, times and schedules, language and structures can be suitably channelled for the evangelisation of today’s world rather than for her self-preservation. (Francis 2013, n. 27)

Therefore, the transformation desired by institutions, especially the religious ones, requires a change in the mentality of their respective leaders. Leadership formation programmes should help participants to remain open to the realities of the world and of the Church, especially pertaining to children and young people. Such programmes should prepare leaders able to welcome the novelties that can further enrich the Marist life and mission, assisting them to commit themselves to building a vision for the future and vitality of the Marist charism.

f. Co-Responsibility Among Brothers and Laypeople

Co-Responsibility among Brothers and Laypeople was seen by interview participants as another limitation in Marist leadership formation, as they considered that laypeople are not sufficiently recognised as co-responsible for the Marist life and mission. The participants recognised that there is still little delegation of authority to laypeople who share the Marist charism.

Global Marist Leader 1 expressed the following doubts regarding the co-responsibility of Brothers and Lay for the Marist charism: “Do we see our lay colleagues as true collaborators? Are we doing enough to involve them in every level of decision-making”? Similarly, Global Marist Leader 2 stated that “another issue that comes up in some parts of the world at a local level is the failure to appreciate the experience of laypeople”. For this participant, in many parts of the Institute:

It must be a Brother in leadership of the school, whereas our experience in some of those countries more and more, is proving that when laypeople move into the school, move into leadership, many of them have been through mentoring, so they tend to be older people, they tend to have had experience at the lower levels of leadership; they have learnt from their experience, so they tend to be better leaders.

For Lafortune and Lepage (2009, 23), “leadership must be provided to foster innovation and initiative and to promote similar leadership among one’s colleagues. This presupposes a certain form of collegiality and the sharing of power and responsibility with accompanied staff”. The document *Being a Lay Marist* states that “laypeople and Brothers have received the same gift from God. Lay Marists bring a new way of living the charism from the secular realm” (Secretariat of the Laity 2017, 16). In addition, this “allows the Brothers to be open to people from other states in life and to discover even more the richness of their own charismatic gift” (Secretariat of the Laity 2017, 16).

According to the interview participants, the promotion of co-responsibility of the Marist laity in life and mission represents a significant imperative for the Institute. For this to occur, a great deal of collective reflection must be undertaken both on the part of the Brothers and the lay Marists, as they seek to build together a common vision and a path of communion and co-responsibility for the charism.

g. Availability of Human and Economic Resources

The seventh category pertaining to the limitations of Marist leadership formation was the *availability of human and economic resources*. According to the participants, there are Administrative Units that suffer from a lack of human resources when it comes to developing leadership formation processes, while other Administrative Units suffer from financial difficulties. For the interview participants, this is the result of a certain asymmetry in structure and economic-financial sustainability among the Administrative Units around the world.

For Global Marist Leader 8, “a present concern is that we need to invest human and financial resources into formation. I’m not sure if it is becoming a priority in many places”. According to this participant, “It’s demanding, because you need to have a place and resources for that; you need to pay the presenters. . . and then, not all the people—especially laypeople—can afford that”. He went on to add, “I am not sure if it is clear in the minds of the leaders that fostering leadership for the future, in terms of Brothers or laypeople, is really a priority”. Global Marist Leader 2 identified the limitation as being linked to “inequality in continents like Africa, where there’s really very little leadership development done”. For this participant, “The biggest limitation is the inequality with which it happens at a provincial level”. As an example, he stated,

There can be countries within a Province that have really positive experiences of developing leadership—they have good mentors, they have good programmes, they send their men and women away to get good training in leadership, but within the same Province you’ll have another country where no one is training to be a leader.

Considering this reality, the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life in the document “Economy at the Service of the Charism and the Mission”, states that,

In recent years, many institutes of consecrated life and societies of apostolic life have faced problems of an economic nature. We could say that this decreased strength has been matched by an increase in difficulties. Insufficient preparation and poor planning of projects has been at the root of economic choices, which have not only endangered assets, but also the very survival of the Institutes. (2018, 11)

According to Global Marist Leaders, pondering the management of resources—particularly financial or human—an important prerogative for the Institute. The real lack of resources the Institute suffers from, and which directly impacts upon the development and preparation of its leaders, should be at the core of the reflection process regarding

this limitation. By confronting this directly, it will be possible to glimpse a better horizon for the future of the charism, especially in areas with strong potential for the Marist life and mission.

7.5 THE STRENGTHS AND CHALLENGES OF THE FORMATION PROCESSES TO RESPOND TO THE CALLS OF THE 22ND GENERAL CHAPTER

The objective of this section is to present the strengths and challenges of the processes of leadership formation in responding to the calls of the 22nd General Chapter. According to the Institute of the Marist Brothers (2020a, 72), “the General Chapter is a representative assembly of the whole Institute. It is a way of giving all Brothers a voice in the life and mission of the Institute, as well as making them feel co-responsible in its government”. It is held every eight years and defines the priorities for the General Government’s mandate, as well as electing the Superior General, Vicar General and General Council to govern the Institute. The 22nd General Chapter, held in 2017 in the city of Rio Negro, Colombia, defined five calls for the whole Institute to revitalise Marist life and mission (Institute of the Marist Brothers, 2017):

1. As a global charismatic family, a beacon of hope in this turbulent world.
2. To be the face and hands of God’s tender mercy.
3. Inspire our creativity to be bridge-builders.
4. To journey with children and young people living on the margins of life.
5. To respond boldly to emerging needs.

The calls of the 22nd General Chapter have become the priorities for the General Government of the Institute for the 2017-2025 period. These calls are the strategic guidelines in the process of revitalising the Marist charism. The formation of the leadership at various levels of Marist life and mission has always been influenced by the calls of the various General Chapters and the strategic implementation of these calls throughout the Institute.

The interview participants were asked what they thought were the strengths and challenges of the formation processes to answer the calls of the 22nd General Chapter.

From their responses, four strengths and three challenges were identified, as shown in Table 7:

Strengths		Limitations	
Category	# GML	Category	# GML
Formation of the Leaders	5	Putting the Calls into Practice	5
Strategic Vision and Direction	3	Promoting Formation Programmes	4
Understanding of “Global Family”	3	Lack of Resources	3
Development of a New Language	1		

Table 7. Strengths and Challenges of the Formation Processes to Respond to the Calls of the 22nd General Chapter

Researcher’s Source, 2021.

Understanding the strengths and challenges of the formation processes to respond to the calls of the 22nd General Chapter is essential to developing proposals for the formation of prophetic and collaborative leadership, and with this, a view to guaranteeing the vitality of the Marist charism. Below follows a brief presentation of the participants’ contributions on each of the categories.

7.5.1 The Strengths of the Formation Processes to Respond to the Calls of the 22nd General Chapter

Four categories of strengths have been identified regarding formation processes’ capacity to respond to the calls of the 22nd General Chapter. They are *formation of the leaders, common vision and direction, understanding of “global family”* and *development of a new language*.

The first category pertained to the formation of leaders itself. According to Global Marist Leader 8, “at least every year, or every year and a half, we have been having a gathering with all the provincial leaders and district leaders. For me, this is something very new and very good, because it gives an opportunity for formation”. As such, according to this leader, the formation focuses on the key leaders in the Administrative Units. Global Marist Leader 7 expressed that “another strategic aspect we have done is that all the regions are more and more organising things by themselves, for instance,

gathering with all the Provincial Councils”. As such, the decentralisation of the formation is enabling a greater number of leaders to be reached at a local level.

The second category identified by interview the participants was the creation of a *strategic vision and direction*, a result of formation processes from the previous General Chapters. Global Marist Leader 3 was of the opinion that the most recent Chapter provided a “strategic vision and direction, and this is a wonderful evolution”. For the interview participants, communication processes about the chapter message have largely contributed to creating this strategic perspective. For Global Marist Leader 3 “the role of communication has been important, whether from the General Administration, through the website, through the Marist *Message Magazine*, or the weekly FMS news. . . those five calls are always promulgated through different and artistic means”.

The *understanding of “global family”* was identified as the third category regarding the Marist formation processes’ capacity to respond to the calls of the 22nd General Chapter. The term “global family” was a novelty in the identity assumed by the Institute during the 22nd General Chapter. For Global Marist Leader 1, the formation processes contributed to “having a better understanding of what it means to be a ‘global family’. The understanding of what it means to be a ‘global family’ has improved and is continuing to improve”.

The fourth category identified was the *development of a new language*. For the interview participants, the formation processes contribute to the strengthening of a new language concerning all aspects of the Marist charism as well as providing continuity. For Global Marist Leader 2, “the greatest strength was that we developed a new language, which provided us with a platform to create something new, something that was innovative, and something that had the potential to work with young people”. For this participant, through this new language, “we had the potential to impact young people”.

The Strategic Plan of the General Administration for Animation, Leadership and Government of the Institute (2017-2025) defined the formation processes for various Marist target audiences to ensure the implementation of the of the five Chapter Calls. These formation processes for Marist leaders seek to be innovative and effective ways to respond to the Chapter calls (Institute of the Marist Brothers 2019, 10). Interview participants identified formation programmes strengths as they are defined in the Strategic Plan and which are being developed at both global and local levels. The participants’ responses showed that the five the Chapter calls assumed as a priority in formation processes are contributing to the construction of a common vision and direction

for the future of the charism, which consolidates the identity of the “global family” and develops a new language capable of bringing the Institute closer to children and young people in the different contexts of the Marist mission.

7.5.2 The Challenges of the Formation Processes to Respond to the Calls of the 22nd General Chapter

Challenges identified by the interview participants regarding the formation processes’ capacity to respond to the calls of the 22nd General Chapter were: *putting the Calls into practice, promoting formation programmes* and *lack of resources*.

The first category expressing these challenges was *putting the Calls into practice*. According to Global Marist Leader 3, the calls are known “but to put them into practice is not easy. But I find many of our leaders trying their best to use the calls as the basis of their animation”. According to the participants, it is difficult to respond through processes of formation to the diverse realities the Institute encounters around the world, even if these processes are designed to help leaders take ownership of the calls of the 22nd General Chapter.

The second category was *promoting formation programmes*. For Global Marist Leader 8, a deepened approach to the Chapter calls was considered to be “a work-in-progress for the leadership programmes that we are trying to build”. For Global Marist Leader 1, “the leadership within the Institute needs to do more to inspire the local leadership to continue to respond to these various calls”.

A lack of resources was identified as the third relevant category for this issue. Global Marist Leader 1 affirmed that “on the provincial level, sometimes the greatest challenge is the lack of human resources”. This same leader also identified a lack of “financial resources, and maybe a limitation of geographical isolation, or a lack of other types of resources or amenities: internet, those types of things, to try to live the call”. Global Marist Leader 4 corroborated this line of thought stating, “I have to be honest and include economic resources, because sometimes we are not yet completely sharing the resources, and some areas that are not so wealthy economically, for example Asia and Africa, probably will need more support”.

The final message of the 22nd General Chapter (Institute of the Marist Brothers 2017, 14) states that “we need to be a ‘global family’ in communion and solidarity”. The same document adds that “our resources must be at the service of the life and mission of

the entire Institute”. As such, it can be argued that formation processes promoted by the Institute still face the challenge of guaranteeing leaders’ proper formation, of adequately considering the lack of sufficient resources, especially in realities characterised by greater economic and social vulnerability, and of putting into practice the calls of the 22nd General Chapter to revitalise the Marist charism, as expressed in the Chapter documents. Truly responding to these challenges could result in Marist leaders who are better equipped to guide the Institute towards a horizon of greater possibilities for the Marist charism’s future.

7.6 THE ROLE OF THE GENERAL COUNCIL IN ATTRACTING AND FORMING OF LEADERS

This section addresses the role of the General Council in attracting and forming Marist leaders. The question put to the interview participants was “How should the General Council ensure the attraction and formation of leaders in the Institute for the vitality and continuity of the Marist charism”?

7.6.1 Attraction of Leaders

Regarding the attraction of leaders, the participants spoke of two key categories: *supporting local leaders* and *sharing the vision* (Table 8).

Category	#GML
Supporting Local Leaders	7
Sharing the Vision	2

Table 8. Role of the General Council in Attracting Leaders
Researcher’s Source, 2021.

The first category identified pertains to *supporting local leaders* in the processes of attracting leaders to Marist life and mission. According to the participants, this category refers to support for attracting leaders provided at the level of the Administrative Units, as well as the Marist Regions. For the participants, the main responsibility for attracting leaders falls to the leaders of the Administrative Units, and the role of the General Council is to support and encourage them in their efforts to attract potential Brothers and lay leaders to the Marist charism. In this regard, Global Marist Leader 7

commented that leaders “should be attracted at the local level. It is not the mission of the General Council”. Corroborating this line of thought, Global Marist Leader 4 affirmed that “our intention is to work more and more with the regional leaders. The important work we have to do is to work with the regional leaders as they work on attracting new leaders”.

To attract leaders at the level of the Administrative Units or at the regional level, the participants also recognised the need for planning which would then be supported by the General Council. Global Marist Leader 3 indicated that “the General Administration needs to help provincials at the regional level plan for formation of provincial leadership over the course of the next ten years”. According to this leader, it was necessary “to identify who are the Brothers or Laypeople who have the potential to be leaders and work with them so as to prepare them to be future leaders”. The emergence of this leadership planning is in large part due to the need for Marist leaders who are better prepared for the current challenges faced by the charism. For Global Marist Leader 2, they said “we need to change our mindset, change our paradigm of thinking where we’re going to get our leadership from. We have to be prepared to import leadership at times, particularly for specific roles and specific jobs; we need those skills”.

The interview participants understood that attracting leaders at the local level is more effective because it is within the context in which Marist life and mission take place. This allows new leaders to have a greater knowledge of the Marist reality and the requirements for their leadership. It also allows the Institute to promote a process of attraction and development of leaders more suited to each specific reality and its respective needs.

The second category mentioned was *sharing the vision*. According to Global Marist Leader 6, it was important to “first shape the vision and then communicate this vision to others to attract and ultimately prepare future leaders in the core values of the charism”. For this leader, “the General Council should communicate clearly this vision, showing the ways of doing it and the possibilities to reach it”. Contributing to this line of thought, Global Marist Leader 5 stated that “the General Council has to encourage the local leaders. . . we have the moral task of encouraging them and sharing with them our experience of life and vision”. In this context, the Institute must look attentively to attracting the next generation of leaders. According to Castro:

The new generations. . . gradually represent a significant part of the workforce in companies, contributing to the results with their characteristics of innovation, flexibility,

constant search for professional development and training aligned with personal satisfaction. (2011, 7)

In this regard, the attraction of new candidates to the religious life of a Marist Brother, as well as to lay Marist life, should be equally present. For this reason, the support of the General Council for local processes of vocational animation is necessary.

Marist Vocation Animation presents and proposes to all youth the concept of following Jesus. This itinerary aims to make it possible for young people to carry out their life projects by living and experiencing the charism of Champagnat within the Marist Institute. (União Marista do Brasil 2014, 19)

Therefore, it is evident that participants considered the General Council's role to include supporting local leaders in their undertaking of the processes of attracting and retaining leadership, as well as sharing the General Council's own vision of leadership and the future of the Marist charism. Consequently, it is necessary to invest in a complete and ongoing formation programme aimed at attracting and accompanying Marist leaders who can commit themselves in a profound way to Marist values and principles.

7.6.2 Formation of Leaders

Regarding the General Council's role in the formation of leaders, the interview participants evoked four different categories: *promoting leadership formation programmes*, *accompanying leadership formation processes*, *offering leadership formation guidelines* and *raising awareness of the need for leadership formation* (Table 9).

Category	#GML
Promoting Leadership Formation Programmes	6
Accompanying Leadership Formation Processes	2
Offering Leadership Formation Guidelines	3
Raising Awareness of the Need for Leadership Formation	1

Table 9. Role of the General Council for Leadership Development
Researcher's Source, 2021.

The identification of the General Council's role as a global leader in the formation of Marist leaders is essential to the continuity of the charism. The categories analysed below demonstrate the Global Marist Leaders' perspectives on each issue.

a. Promoting Leadership Formation Programmes

The first category pointed out by participants is *promoting leadership formation programmes*. The participants believed that the General Council should promote the formation of leaders in accordance with the Marist charism across all segments and sections of the Institute. At the global level, the General Council should assume responsibility for developing programmes and supporting local and regional formation initiatives. However, the participants recognised that in some realities of the Institute, the General Council must foster more directly the necessary conditions for Marist leadership formation.

According to Global Marist Leader 4, the General Council “should organise and create or promote very good leadership programmes for the Institute”. This leader held the view that the General Council should “not only offer programmes but also support, promote and help the Provinces that already have programmes in regions like North America, South America or Europe”. With respect to the General Council’s support of programmes developed at the level of the Administrative Units or Marist Regions, Global Marist Leader 1 recounted that “there are some answers on regional levels, but I don’t necessarily know how we do it on the level of an Institute, other than encouraging it, fostering it, maybe supporting it”.

Similarly, Global Marist Leader 5 affirmed that “there are elements that are being done in the Institute. For example, there is a greater awareness of formation in Marist identity. I believe that we must make an effort, we must support it”. According to this participant, the General Council should be capable of “creating the conditions so that the next generation of leaders will be formed successfully with a fidelity to the charism, a sense of discernment, and a sense of mission and Marist life in the future”.

The promotion of formation programmes is also a request of the 22nd General Chapter. Among the suggestions to the General Council, the Chapter stresses that “each Administrative Unit develops a plan for promoting different forms of Marist life, including appropriate strategies for formation, accompaniment and belonging” (Institute of the Marist Brothers 2017, 12). Thus, for the interview participants, *promoting leadership formation Programmes* is one of the ways in which the Institute’s General Council can ensure the formation of its leaders with a view to guaranteeing the vitality of the Marist life and mission.

b. Accompanying Leadership Formation Processes

The second category regarding the General Council's role is *accompanying leadership formation processes*. For the interview participants, the General Council has a significant part to play in accompanying the formation processes of Marist leaders at the global, regional and local levels. The participants believe that the General Council's accompaniment aims to ensure that formation processes occur in all spheres of the Institute and segments of activity, as well as guaranteeing leaders' empowerment in the Marist charism.

For Global Marist Leader 6, "the General Council. . . should accompany closely the Provinces and their ministries". According to this leader, the Institute "needs to ensure that those taking up the role of leadership in the Administrative Units are trained, accompanied, and supported in their formation processes". For the participants, the accompaniment of leadership formation processes should be prioritised specifically in the scope of the Administrative Units and Marist Regions. For Global Marist Leader 8, these programmes were "a concrete way of accompaniment which comes from the grass roots". He went on to confirm that "not everything is organized from Rome, but rather we are accompanying and fostering things that are happening already in the Regions".

Constant accompaniment is designed to guarantee leaders' actions regarding Marist life and mission. For Lafortune and Lepage:

The accompaniment in this model draws on reflection within and about the action, to ensure continuity and cohesion with the directions of the change to be implemented. It is enriched with training and can be supported by research while monitoring and continuity are maintained. This continuum in time makes it possible to cover the various phases of a complete work cycle (a little more than one year) inside an organisation. (2009, 10)

For those interviewed, it is the General Council's responsibility to accompany the processes of leadership formation. This is to ensure the necessary changes in the formation of Marist leaders and to achieve the necessary transformation and adaptations to the Marist charism in the contemporary world.

c. Offering Leadership Formation Guidelines

As a third relevant category to the General Council's role, participants identified *offering leadership formation guidelines*. For the participants, guidelines for leadership formation could orient formation for both Brothers and lay Marists, contributing to a more

integrative vision of Marist leadership and promoting formation in the areas of the Institute that are more challenged when it comes to formation processes and the accompaniment of leaders.

For Global Marist Leader 5, “the General Government could organise reflection on the formation guidelines that we have in the different areas of the Institute”. In his view, the reflection “on the adaption of the formation for the Brothers and on the idea of formation itself, as well as on the lay leadership formation programmes” needs to occur. This Marist Leader concluded that “if the General Administration could offer some guidelines to deepen formation for those who lead the mission, we would be able to assist the Provinces in advancing in this field”.

For the participants, the guidelines for Marist leadership formation should contemplate a broader overview of the Institute and the essential elements of the Marist charism. In regard to this, Global Marist Leader 7 was of the opinion that “any leadership formation programme should emphasise two things: having a vision for the institution and referencing the essential elements of the Marist charism”. According to this participant, “this is already being done at all levels. By ‘essential elements’, I mean the Marist values. This is already being done at the local level”.

On this issue, the 22nd General Chapter also reinforces the General Government’s capacity to develop a plan for the just sharing of human and financial resources at all levels of the Institute (Institute of the Marist Brothers 2017, 12). Participants recognised that the General Council could offer guidelines to steer the Marist leadership formation at all levels of the Institute. These guidelines can be an effective means to universalise the formation of Marist leaders and to qualify any initiatives undertaken by Marist Administrative Units and Regions.

d. Raising Awareness of the Need for Leadership Formation

The fourth category was *raising awareness of the need for leadership formation*. Participants considered that an important responsibility for the General Council and one of the Institute’s great needs is to increase awareness of the existing demand for Marist leadership formation. For the participants, it is difficult for the Institute to implement leadership formation programmes across the spectrum without first promoting proper awareness of the need for leadership formation. On this issue, Global Marist Leader 5

stated that “from the first moment, an idea that comes to mind (in English), is ‘awareness’; we are called to raise awareness”. For this participant:

We must be aware that the Institute, as it is now and as it will be in the future, is going to need leaders who have a formation in Marist identity and professionalism in order to be able to live out Marist mission and life.

Global Marist Leader 5 states that “to raise awareness that it is necessary for leadership formation to be planned” is important. However, it is “not a matter of seeing if there is a leader or two leaders capable of doing a task/tasks, but really how the conditions are created so that one generation can succeed the other”.

In Paulo Freire’s view “awareness is man’s mysterious and contradictory capacity to distance himself from things in order to make them present, immediately present. . . . It is man’s behaviour when faced with his surroundings, transforming them into the human world” (1987, 8). Hence, the *raising awareness of the need for leadership formation* category becomes a fundamental role of the General Council, in which it ensures the formation of leaders in the Marist identity and thus foster a horizon of vitality and perpetuity for the charism.

Undoubtedly, the interview participants believe the General Council should commit itself to promoting leadership formation programmes, accompanying leadership formation processes, offering leadership formation guidelines and raising awareness of the need for leadership formation to ensure the formation of Marist leaders. The General Council’s commitment to these initiatives can provide the Institute of the Marist Brothers with a framework of well prepared and committed leaders, able to respond to the challenges of the Marist charism.

7.7 THE PLACE AND ROLE OF LAYPEOPLE AND MARIST BROTHERS IN MARIST LIFE AND MISSION

The transition that the Institute of the Marist Brothers is experiencing due to the aging and significant reduction in the number of Marist Brothers, as well as the great increase in numbers and activities of laypeople, makes understanding the place and role of laypeople and Brothers in Marist life and mission significant.

7.7.1 Place and Role of the Laity in Relation to Marist Life and Mission

Regarding this issue, the following question was asked to the participants: “How do you see the place and role of the laity in relation to Marist life and mission”?

From the answers of the eight interviews participants, it was possible to identify the following relevant categories for the place of the laity: *they are central to the charism, sharing Marist life and mission and leadership positions*; and for the role of the laity: *co-responsibility in the life and mission and Marist leadership* (see Table 10).

Place	#GML	Role	#GML
They are Central to the Charism	8	Co-responsibility in the Life and Mission	6
Sharing Marist Life and Mission	7	Marist Leadership	4
Leadership Positions	6		

Table 10. Place and Role of Lay Marists

Researcher’s Source, 2021.

Recognising these categories is fundamental to understanding the presence of the laity in the Institute and to planning their formation to encourage participation and commitment to the charism.

a. The place of the laity in Marist life and Mission

Regarding the place of the laity in Marist life and mission, the participants mentioned three categories: *they were central to the charism, sharing Marist life and mission and leadership positions*.

The first category identified was that they were *central to the charism*. In the view of the participants, the laity are co-heirs of the Marist charism. Therefore, together with the Brothers, they feel inspired to live and bear witness to the Marist charism. For Global Marist Leader 2 the laity’s place in Marist life and mission was “central, especially as the number of Brothers decline, and even in those areas where we’re getting more vocations, perseverance is not at such a high level”. According to this participant, if we really “believe in the Marist charism—the charism of Marcellin Champagnat—the laity is vital

for the world, and because it is a gift of the Holy Spirit, laypeople become central to that”. Aligned with this, Global Marist Leader 3 stated “I agreed with the idea that the future of Marist charism is the commitment of communion of committed Brothers and Lay. I am convinced of that”.

Global Marist Leader 4 further suggested that laypeople are central to Marist life and mission “not only because of the number of the Brothers that is part of the reality but also because the Marist charism is not a possession, or something solely belonging to the Brothers, but to the Brothers and Lay together”. Similarly, Global Marist Leader 7 affirmed that the Brothers will have to “continue to discover the layperson as a ‘partner’ in Marist life and mission who will live his/her Marist vocation as a layperson.”

The document *Being a Lay Marist* indicates that “the integrity and fruitfulness of the Marist project into the future will depend on women and men, Brothers and Laypeople, committed to their discipleship of Jesus, with a strong sense of community and passion for mission” (Secretariat of the Laity 2017, 9). In this way, the participants confirmed the reflection process undertaken by the Institute in recent years around the Marist charism, which seeks to understand and welcome the Marist laity as co-responsible of the charism.

The second category expressed by the participants was *Sharing Marist Life*. For them, welcoming lay Marists as co-responsible for the Marist charism is natural so that they too can fully share in Marist life. This sharing translates into an understanding of the lay vocation as an expression of one’s own charism. When referring to the Marist laity vocation, Global Marist Leader 5 stated that “We know that it is still developing in the charismatic area of the Institute”. According to this participant, “It is possible that, in the future, one of the great dilemmas will be whether this vision of the laity and their formation will be a branch of the Institute, an element of the Institute, or will be built up independently for what it is going to do”.

The lay Marists themselves recognise the Marist vocation as a precious gift received from the Holy Spirit and a way of living their Christian vocation. In the document *Around the Same Table*, the Marist laity express their vocation in this way: “we Christian men and women with very different histories and very different cultures share the call to live the Marist charism through the lay state” (International Editorial Commission 2009, 28). As such, the interview participants highlighted Marist life, and in particular the lay vocation, as holding a special place for the laity in their experience of Marist life and mission.

The third category on this issue was *Leadership Positions*. For the participants, lay Marists should occupy positions of leadership in Marist life and mission in co-responsibility with the Marist Brothers. The Global Marist Leader 8 said that “In the last 15 or 20 years, more and more laypeople are in leadership positions as headmasters or principals in schools, or at the level of the Province”. As such, for this participant, “It is crucial now to have laypeople at that level of leadership; their role is very important”. According to Global Marist Leader 1, lay Marists “Have to be considered as equal partners with the Brothers”. For this reason, he continued, “Any place where there are levels of decision-making that involves laity, they have to be part of those decisions, especially in light of their involvement in the mission”. Global Marist Leader 7 reinforced this point of view by affirming that lay Marists “should also intervene in the management of the common elements of the Marist life and mission”.

In the context of the Institute of the Marist Brothers, the presence of laypeople in leadership and decision-making positions is seen as the fruit of communion between Brothers and laymen and women surrounding the Marist charism: “the communion between Laypeople and Brothers complements and enriches our specific vocations and different states of life. There is not only a place for both at the table, but we need each other at our side” (International Editorial Commission 2009, 59). Therefore, in the view of the participants, lay Marists should take their full place in the Marist charism, sharing in the Marist life and mission and in leadership positions.

b. Role of the Laity in Marist Life and Mission

Regarding the role of the laity in Marist life and mission, the participants reported on two categories: *co-responsibility in the life and mission* and *Marist leadership*.

The first category referred to *co-responsibility in the life and mission*. The participants recognised the full co-responsibility of the laity in reinterpreting and making the necessary decisions for Marist life and mission in the contemporary context. Global Marist Leader 6 stated that “we need to recognise that they are the ones bringing on and taking the role of the institution. They are the face of the institution in many places already”. According to this leader, the role of the lay Marist is “to recreate, reimagine Marist life and Marist mission and I think that is a very important responsibility for them”.

Global Marist Leader 8 also expressed that “the role of laypeople in the future of the Institute especially regarding our Marist mission, but also in Marist life is crucial”.

However, participants did not perceive a role for laypeople in decisions concerning the life of the Marist Brothers. In this sense, Global Marist Leader 1 declared: “I don’t always believe the laity has a role, of decision-making *per se*, in a Brother’s community, if they’re not living in the community”.

The Marist Brothers’ Constitutions and Statutes thus reflect the co-responsibility of Brothers and laity “by building communion, providing accompaniment, sharing our spirituality and community life. . . and promoting co-responsibility for Marist life and mission” (Institute of the Marist Brothers 2020a, 19). Therefore, in the view of the participants, the laity have an active and important role in the Marist life and mission. The co-responsibility assumed by Brothers and laity has a strong relevance for the future of the Marist charism. In addition to co-responsibility, *Marist leadership* was the second category identified by the participants. When addressing leadership in Marist life and mission, the participants understood the empowerment of laypeople and their role in the vital decisions and processes of Marist life and mission.

For Global Marist Leader 5, “The laity has, and will continue to have, a leading role in the mission of the Institute”. Similarly, Global Marist Leader 2 stated that “We need to find new ways of forming Marists, that take into account their lay life: I think we need to find structures that enable Lay Marists to participate more and more in leadership”. The engagement of laypeople in leadership roles in the Marist life and mission is also recognised by interview participants as an opportunity for the vitality of the charism. For Global Marist Leader 6, the main role for lay Marists “was to encourage, to engage, to live this Marist life, and according to the responsibility they have, to make sure that this Marist life, this Marist mission can keep going in the years to come”.

In this regard, Brothers and lay Marists understand Marist life and mission as a space for communion, sharing and co-responsibility:

Together, from our personal and shared mission, we seek to discover the dream of God. He is calling us to revitalise the mission, widening it and opening it up to new challenges. He is sending us to convert his dream into reality. (International Editorial Commission 2009, 50)

Consequently, the leadership of lay Marists in Marist life and mission opens opportunities for gaining a new perspective on Marcellin Champagnat’s legacy in the world today. While allowing laypeople to live their Marist vocation to the full, leadership also brings a new vigour to Marist life and religious vocation. Therefore, in the perception of the interview participants, the laity have a place and a fundamental role in the Marist

life and mission. For the participants, the laity's participation could strongly contribute to the vitality of the Marist charism by giving new impulse to the Marist evangelising mission for children and young people.

7.7.2 Place and Mission of the Marist Brothers in the Present Context of the Marist Charism

Concerning this issue, the following question was asked: "How do you see the place and mission of the Marist Brothers in the present context of the Marist charism"?

Regarding the place of Marist Brothers in the present context of the Marist charism, the following relevant categories were identified by the interview participants: *charismatic presence in the life and mission, together with the Marist laity* and *international availability* (see Table 11). As for the mission of the Marist Brothers, the following categories were identified: *co-responsibility for life and mission, experts in fraternity, among children and young people* and *formation of Marist leaders*.

Place	#GML	Mission	#GML
Charismatic Presence in the Life and Mission	6	Co-responsibility for Life and Mission	8
Together with the Marist Laity	2	Experts in Fraternity	5
International Availability	1	Among Children and Young People	2
		Formation of Marist Leaders	2

Table 11. Place and Mission of the Marist Brothers
Researcher's Source, 2021.

A proper grasp of these categories has allowed for a better understanding of the future horizons for the Marist Brothers. In particular, the present context of the charism is marked by a decrease in religious vocations to the Brothers and at the same time by a significant increase in the number of laypeople who are committed to the charism and are involved in both Marist life and mission.

a. *Place of the Marist Brothers in the Present Context of the Marist Charism*

The defining characteristics for the place of the Marist Brothers in the present context of the Marist charism were seen by the participants as the *charismatic presence in the life and mission, together with the Marist laity, and international availability*. The first category addresses the *charismatic presence in the life and mission*. For the participants, the Marist Brothers' presence in life and mission is essential as they serve as witnesses and transmitters of the Marist charism to the laity, children, and youth.

According to Global Marist Leader 8, it was important to recognise that “at the moment, the Brothers are a minority in numbers with regards to Marist mission”. This participant continued to state that “some Brothers are of a certain age, and there is not a large number of younger Brothers”. In this sense, the participant believed that the Brothers should “witness God’s presence among the neediest, but in a real way to be more of a ‘brother’ to them, to be close to them and to be signs of hope for them”. Global Marist Leader 7 stated that “the Brother contributes from the experience that he is making of the charism by his style of life; he brings that perspective to something that we all do, but we do not have any particular task assigned to us”. Similarly, Global Marist Leader 2 affirmed that lay Marists “see Brothers as focal points where they can connect for community. What the Brothers bring that is different is community—our desire for community and communion”.

The presence of the Marist Brothers in life and mission becomes an encouraging presence to the charism for both young people and lay Marists. According to the Marist Brothers' Constitutions and Statutes “we [Marist Brothers] support educational, pastoral and solidarity activities with our presence and encouragement. We offer welcome and hospitality in our communities to those looking to experience our Marist life” (Institute of the Marist Brothers 2020a, 77). Thus, the Brothers' witness can become a source of renewal and vitality for Marist vocations and mission, opening present perspectives for the future of the Marist charism.

The second category relevant to the place of the Marist Brothers is *together with the Marist laity*. The participants realised that the Marist Brothers' place is with the Marist laity as mentors of the charism and builders of communion. According to Global Marist Leader 1, “as we have been for generations of young people, we can continue to be mentors to laymen and women, as laymen and women can be mentors to us”, Global Marist Leader 5 stated that “the Brothers have much to say and have much to offer in

helping to develop itineraries, spiritual pathways, and a unique style of Marist leadership for the laity”. According to this leader, the Brothers must “serve as reference points for some matters because of their experiences and because they continue to be well-received where they are”.

Within the scope of the Institute, the Brothers are situated within the dimension of the global charismatic family (Institute of the Marist Brothers 2020a, 19). In relation to this, the Brothers’ presence of support, communion, and witness to the charism could greatly contribute to encouraging the commitment to the Marist charism on the part of the laity and the strengthening of the Marist mission.

International availability was the third category. For the interview participants, the Marist Brothers should be available to live and carry out their mission in the most varied contexts of the Institute, and wherever their presence is needed. Global Marist Leader 8 affirmed that he sees “more and more the aspect of internationality and availability of the Brothers to go beyond their own city, their own country, their own Province”. According to this leader, the Institute will need “in the future, some Brothers as a presence in some places where there are probably no more Brothers from that specific place. Brothers from other regions of the Institute may be needed there”.

Global availability is one of the priorities of the Marist Brothers Institute. The Constitutions and Statutes (Institute of the Marist Brothers 2020a, 70–1) affirm that “as Marists, we desire to grow in global availability, being prepared to go well beyond the customary bounds of our Administrative Units and regions and committing ourselves to international collaboration for mission”.

According to the interview participants, international availability, in addition to reinforcing the international identity of the Institute, allows for the enrichment and strengthening of the Marist charism, especially in realities where the Marist presence and mission require greater support and attention. Consequently, in the view of the interview participants, the place of the Marist Brothers in the present context of the charism should consider both the dimensions of Marist life and mission. In this regard, the Brothers become a charismatic presence, reinforcing communion and availability for service. Most importantly, this should occur where the witness of the Marist religious vocation has become urgent for the vitality of the Marist charism.

b. *The Mission of the Marist Brothers in the present context of the Marist Charism*

With respect to the mission of the Marist Brothers in the present context of the Marist charism, it was possible to identify from the interview participants' responses the categories of *co-responsibility for life and mission, experts in fraternity, among children and young people* and *formation of Marist leaders*.

The first category that participants expressed pertained to *co-responsibility for life and mission*, recognising that the present and future of the Marist charism will be marked by the co-responsibility of Brothers and laity for the Marist charism. Participants believe that in this context, the Brothers would have a strong collaborative role with the laity, encouraging them to deepen and commit themselves to the charism, offering formation and being promoters of communion.

Global Marist Leader 6 affirmed that “the role of co-responsibility of the Brothers is clear by the very nature of their vocation”. Similarly, for Global Marist Leader 8, “part of the role of the Brothers (apart from living their vocation fully), is to work more and more with our lay brothers and sisters”. However, this leader specified that it was important that “the laypeople that carry the charism must really live the values both internally and strongly”. For this leader, laypeople “should feel the connection with the global Institute, where there will be Brothers and laypeople from other parts of the world whom they can connect with to better keep alive the fire of the charism”. The co-responsibility of Marist Brothers and laypeople for Marist life and mission “involves all levels: decision making, planning, implementing and evaluation. We share whatever the diverse states of life are able to contribute to the shared mission” (International Editorial Commission 2009, 43). Therefore, the participants recognised a future of co-responsibility for Brothers and lay Marists regarding all aspects of the mission and common elements of Marist life.

The second category is to be *experts in fraternity*. For the interview participants, the dimension of fraternity is intrinsic to the identity of the Marist Brother and, therefore, constitutes their primary mission. For Global Marist Leader 4, fraternity was “the key to the process of the Brothers in the future—the legacy that we need to have in some areas, especially the religious areas, and the reminders of brotherhood in the Institute”. Complementing this idea, Global Marist Leader 5 expressed that “the journey of the Brothers passes through an acceptance that our vocation asks us to be signs for others”,

adding that “we can live this sign profoundly, we can live it generously and we can share it with others”.

At the Institute level, there is a growing awareness of the dimension of the Marist Brothers’ fraternity as their first mission in the Church and in the world.

In response to the loving action of God that consecrates us as Religious Brothers, we offer ourselves to Him through the profession of the public vows of chastity, obedience and poverty. Following in the footsteps of Jesus we want to continue His mission and be a sign of brotherhood for our world. (Institute of the Marist Brothers 2020a, 25–6)

Likewise, the Congregation for the Institutes of Consecrated Life and Societies of Apostolic Life addresses the dimension of the brotherhood in this way:

The name “Brothers” positively designates what these Religious assume as a fundamental mission in their lives: “These Religious are called to be brothers of Christ, deeply united with Him, “the firstborn among many brothers” (Rom 8:29); brothers to one another in mutual love and working together in the Church in the same service of what is good; brothers to everyone in their witness to Christ’s love for all, especially the lowliest, the neediest; brothers for a greater brotherhood in the Church. (2015, 9)

Thus, for the interview participants, one of the missions for the Marist Brothers in the present context of the Marist charism is to promote fraternity in all places where they are present and active through their witness of life and their explicit desire to contribute to the building of the great universal family.

As a third category regarding the mission of the Marist Brothers, *among young people* was identified. For the participants, since the foundation of the Institute, the mission of the Marist Brothers has been the evangelisation of children and young people. For this reason, they consider the presence of the Brothers among young people to be essential to continue their evangelising mission and to continue to encourage you people, inspired by the Marist charism, to live the Gospel.

Considering the mission of the Brothers among children and young people, Global Marist Leader 8 expressed this perspective:

I see the role of Brother as being freer from larger structures, caring more for people, being present to them, listening to them—in light of the Gospel—and sharing with them the values we believe in. I am afraid that in the future we will be less close to children and young people because of the demands of the positions of leadership that we hold.

Similarly, Global Marist Leader 5 affirmed that “we [Brothers] have to take certain positions, because we have to give a little time to a direct apostolate where we work for children and young people”.

The foundational principles clearly delineate the Marist mission with children and young people as the legacy of Marcellin Champagnat and the first Brothers.

In the same way that Marcellin was thinking especially of the least favoured of young people in founding the Marist Brothers, our preference is to be with those who are excluded from the mainstream of society, and those whose material poverty leads them to be deprived also in relation to health, family life, schooling, and education in values. (Institute of the Marist Brothers 2007, 33)

In this way, those interviewed understood the evangelising and educational mission of the Brothers among children and young people as preferential. Besides revitalising the Marist charism, the mission represents the continuity of the Marist legacy throughout history.

The fourth category was the *formation of Marist leaders*. The participants believe that in the present context of the Marist charism, the Marist Brothers have a significant role in forming leaders, especially lay leaders, for Marist life and mission.

Global Marist Leader 5 said:

There are other values much more profound in the role of the Brothers which enhance leadership in the Institute. As a priority, we need to assist in the formation in the Marist charism of present and future leaders to help them reinterpret that fidelity to the charism in the new contexts.

For Global Marist Leader 8, the mission of the Brothers must concentrate on “concrete programmes for the next generations of leaders, those who may not have met or known the Brothers and who will now be leaders within our mission and life”. In addition, he insisted that laypeople “can get the charism from other laypeople, but those laypeople should be really inspired by the charism. If not, the name ‘Marist’ can be there, but I don’t think it would be really a Marist School”.

In this sense, “laypeople and Brothers who share responsibility should have professional qualifications, together with up-to-date ongoing formation, and must have an attitude of respect for and solidarity with people, as well as a deeply lived spirituality” (International Editorial Commission 2009, 47).

For the participants, the Brothers’ mission when it comes to the formation of Marist leaders and most especially that of the laity is essential to the future of the Marist charism. For participants, the Brothers would be ensuring the transmission of the charism

to future generations through the formation of Marist leaders. Consequently, according to the interview participants, in the present context of the Marist charism, the mission of the Marist Brothers should prioritise co-responsibility with the laity for Marist life and mission, promote fraternity, be an evangelising presence among children and young people, and ensure the formation of Marist leaders. This would make a greater dynamism and revitalisation of the Marist Brother's vocation possible, resulting in a greater vitality of the Marist charism.

7.8 FINAL CONSIDERATIONS FOR THE FORMATION OF LEADERS COMMITTED TO THE MARIST CHARISM

This section will deal with the final considerations of the Global Marist Leaders on the formation of leaders committed to the Marist charism. The question posed to the participants was: "Is there anything that we have not discussed regarding the role of leaders in maintaining the Marist charism that you would like to add"?

Two categories emerged in participants' responses: better definition of the role of the General Council and formation of Marist leaders for this time (see Table 12).

Name	#GML
Better Definition of the Role of the General Council	4
Formation of Marist Leaders for this Time	4

Table 12. Final Considerations on Leadership Development
Researcher's Source, 2021.

Most of the categories presented by the participants complemented those presented in the previous questions.

7.8.1 Better Definition of the Role of the General Council

The first category discussed was the *better definition of the role of the General Council*. For the participants, the role of the General Council at the various levels of the Institute, as well as in relation to the Marist charism, is not sufficiently clear. For Global Marist Leader 1, the role of the General Council is not clear except in areas pertaining to governmental issues, where it acts collegially with the Superior General. He added, "Do we really understand our role in the promotion of leadership and of the charism"?

Similarly, Global Marist Leader 2 stated that “I think this General Council may have ‘missed the boat’ on that. I think we’re doing many good things, but I don’t think we’re doing the thing we should be doing as well as we should be doing them”. He also affirmed that “the most significant thing is for the General Council is to develop a well-articulated vision”. This participant finalised his thoughts by reaffirming that the vision “comes out of the General Chapter, but the General Council and the General Administration needs to articulate it and make it alive. This is very important”.

Regarding the role of the General Council, Marist Brothers’ Constitutions and Statutes state that:

The Vicar General and the General Councillors are the direct collaborators of the Superior General in governing the Institute. They are available to the Superior General for any task that he may entrust to them and he consults them on important matters concerning Administrative Units and Regions. (Institute of the Marist Brothers 2020a, 141–2)

Based on the participants’ contributions, it is imperative for the Institute of the Marist Brothers to better define the General Council’s role, especially as a global leader, in all aspects related to Marist life and mission. Greater clarity regarding the General Council’s role could contribute to a better articulation of its vision and institutional strategies, as well as strengthening Marist life and mission in all its aspects and realities.

7.8.2 Formation of Marist Leaders for this Time

The second category that emerged was the *formation of Marist leaders for this time*. The participants revealed concern for the formation of Marist leaders who understand the context of the Church and the world today, especially the reality of children and young people, and are inspired by the principles and values of the Marist charism when responding to the challenges and opportunities that present themselves.

For Global Marist Leader 5, the Institute needed “To help in forming this new leadership with a style appropriate to the times in which we live”. For this leader, “The fields of leadership formation are the cultural and anthropological keys that cannot be lost. When we speak of Marist leadership in the world, I have my doubts that people understand ‘leadership’ the same way in the different parts of the Institute”.

Global Marist Leader 6 affirmed that “It is important to underline that we need to be open to other realities, to other ways of being formed”. According to this leader, it was “important to go beyond our borders, our borders as Marists, to get in touch with other

congregations, to have people working in leadership in other different scenarios that can help the same institution”. Similarly, Global Marist Leader 3 expressed that to form leaders in the current context, it is necessary “To prepare the leaders for the Marist charism and Marist life and mission. . . while it is important to prepare them academically, it is also important to offer them experiences which they can share”.

Therefore, Marist leadership today should be able to overcome institutional and cultural boundaries to meet the human person. For the Pope Francis (2020b, n. 91), “If the acts of the various moral virtues are to be rightly directed, one needs to take into account the extent to which they foster openness and union with others. That is made possible by the charity that God infuses”.

Thus, the participants expressed the desire that the Institute forms leaders who are open, competent, attuned to the world, committed to the Marist charism, and capable of responding to God’s challenges and calls now and in the future.

The additional elements of better definition of the role of the General Council and formation of Marist leaders for this time identified by the participants as needing to be taken on by the Institute could ensure the formation of leaders committed to the future of the Marist charism.

7.9 CONCLUSION

The analysis of qualitative data collected through semi-structured face-to-face interviews provided important elements to better grasp the role of the General Council of the Marist Brothers as a global leader in ensuring the formation of prophetic and collaborative leaders committed to the vitality and continuity of the Marist charism. This analysis has also identified the strengths, challenges, and crises for the Institute of the Marist Brothers to be able to improve the processes of formation of Marist leaders, in order that they meet those challenges and opportunities for Marist life and mission in today’s world.

The findings of the analysis of the interviews, together with the results and findings of the quantitative questionnaires, also facilitated the identification of key elements for the formation of prophetic and collaborative global leaders capable of contributing to the continuity and vitality of the Marist charism.

CHAPTER EIGHT

STUDY FINDINGS REGARDING THE FORMATION OF LEADERS COMMITTED TO THE CONTINUITY AND VITALITY OF THE MARIST CHARISM

8.1 INTRODUCTION

This chapter presents an account of the findings of the transverse analysis of themes as a whole that have arisen from the two parts of the empirical research (Chapters six and seven), using an online questionnaire with fifty-seven (57) Marist leaders of the Administrative Units (AU Marist Leaders) and eight (8) semi-structured interviews with members of the General Council (Global Marist Leaders) from the Institute of the Marist Brothers. The analysis is also based on the literature review, which is found in Chapters two, three and four. This ensures that the perspectives of both the global and local leaders of the Institute of the Marist Brothers are brought to bear on the problem and objectives of this research.

Data was collected to respond to the research objective of this case study which explores the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the Marist charism. The study findings are of significant relevance for the Institute, particularly with regards to its approach in forming leaders who can contribute to the future of the Marist life and mission. To this end, reflecting on formation processes, as well as on the Institute's Global Leaders' role in ensuring Marist leadership formation programmes revolving around the Marist charism, become of paramount importance.

This chapter has been divided into three sections. The first section presents the current strengths, challenges and opportunities for Marist leadership formation processes. The second section deals with the role of the General Council, as a global leader, in ensuring the formation of prophetic and collaborative leaders. Finally, the third section presents the essential elements which were identified for the formation of prophetic and collaborative global leaders committed to the vitality and continuity of the Marist charism.

8.2 CURRENT STRENGTHS, CHALLENGES AND OPPORTUNITIES FOR MARIST LEADERSHIP FORMATION PROCESSES

This section presents the research findings responding to the objective “to identify the current strengths, challenges and opportunities for processes of Marist leadership formation so as they can contribute to the Institute’s manner of ensuring the continuity and vitality of the Marist Charism” (Table 13).

CURRENT STRENGTHS, CHALLENGES AND OPPORTUNITIES FOR MARIST LEADERSHIP FORMATION PROCESSES		
STRENGTHS	CHALLENGES	OPPORTUNITIES
1. Increasing the quality and number of formation programmes	1. Defining clear guidelines for the development of Marist leaders	1. Institutional awareness of the urgent need for Marist leadership development
2. Formation programmes at the Regional and Administrative Unit levels	2. Improving the quality of leadership formation programmes	2. Greater knowledge of Marcellin Champagnat’s impact on Marist life and mission
3. Formation programmes with an emphasis on the Marist charism	3. Building leadership capacity	3. The institutional understanding of a global, prophetic and collaborative leadership
4. Institutional support for leadership development	4. Strengthening the co-responsibility of brothers and laypeople for the Marist life and mission	4. A greater sense of a charismatic global family
	5. Greater availability of resources for leadership development	

Table 13. Current Strengths, Challenges and Opportunities for Marist Leadership Formation Processes
Researcher’s Source, 2021.

8.2.1 Strengths of Marist Leadership Formation Processes

On the basis of field research conducted, four current strengths of Marist leadership formation processes were able to be identified, namely: *increasing the quality and number of formation programmes, formation programmes at the Regional and*

Administrative Unit levels, formation programmes with an emphasis on the Marist charism and institutional support for leadership development.

a. Increasing the Quality and Number of Formation Programmes

In the view of the participants, the first strength pertaining to Marist leadership formation processes was a progressive increase in the quality and number of formation programmes available. Both AU Marist Leaders and Global Marist Leaders (participants) have recognised that the Institute is promoting more formation programmes for its leaders.

In particular, the participants held the view that formation programmes offered at the Institute's various levels have improved in quality, even if there is still progress to be made. For many AU Marist Leaders, improvements perceived lie above all in the methodology, contents, holistic vision of the leader, accompaniment processes for participants and improved access to research sources, especially those linked to the Marist charism. A large number of the Global Marist Leaders highlighted the improved selection process for participants, the joint formation of Brothers and lay Marists, the intentionality of the formation programmes, and the infrastructure and resources allocated for formation programmes.

In relation to the increase in programmes offered, a substantial number of Global Marist Leaders highlighted the number of programmes offered at both the international and regional levels. In most Marist regions, Marist leadership formation programmes were being offered in person or online. The increased programme offering favours the participation of more Marist leaders, especially from the Administrative Units.

For a majority of the AU Marist Leaders, improving the quality and increasing the supply of formation programmes is contributing to Marist leaders' improved formation and better preparation for their mission. Better qualified leadership results necessarily in better knowledge of and commitment to the Marist charism.

b. Formation Programmes at the Regional and Administrative Unit levels

For a significant part of the Global Marist Leaders, the decentralisation of formation programmes did not only enable more leaders to participate in formation processes, but also to meet local needs in a more tailored way. This was favouring a more qualified leadership cadre as well as an improvement in the performance of the leaders.

The decentralisation of formation programmes was seen by most of the Global Marist Leaders as an effective means of reconciling the needs of the Institute with those of each local context. It helps to ensure Marist leaders know the elements of Marist identity and develop a global vision of the Institute. Decentralisation also favours addressing the challenges, needs and other elements that are specific to the Marist leaders' local contexts, so that leaders are better prepared for the responsibilities entrusted to them.

From the perspective of a majority of the AU Marist Leaders, programmes offered at the level of the Administrative Units benefitted a broader participation of leaders involved in Marist initiatives and projects associated with the Marist mission. Likewise, they presented an opportunity for the formation of leaders engaged in vocational, religious, community-based and other processes linked to Marist life as a whole. Many Global Marist Leaders emphasised that at the regional level, it was possible to promote networking programmes, which enable the formation and exchange of experiences for leaders who are working at the level of the Administrative Units. This facilitates the allocation of the best human and material resources and infrastructure, as well as contributing to the formation of leaders who have a deepened vision of the Marist life and mission.

As such, in the participants' opinion, the implementation of programmes at the level of the Regions and Administrative Units was enabling formation processes to take place that include the largest number of leaders, that are of a higher quality. Moreover, from the operational and financial standpoint, they become more viable by optimising resources, avoiding large displacements and having their costs in accordance with the local economic reality.

c. Formation Programmes with an Emphasis on the Marist Charism

For the participants, formation programmes are promoting and deepening the knowledge of the Marist charism. Similarly, formation programmes are offering a broader approach to Marist identity and mission.

According to the greater part of the AU Marist Leaders, the Institute's efforts to research, systematise and promote awareness of the life of Marcellin Champagnat, the first Brothers, the history of the Institute, and the Marist vocation and mission, all in the context of the contemporary world, have strongly contributed to the enrichment and revision of the proposed formation programmes. In the vision of the Global Marist

Leaders, these efforts have supported Marist leadership in further developing their knowledge of the charism.

For both the AU Marist Leaders and Global Marist Leaders, promoting learning on the Marist identity and mission facilitated greater vitality for educational and evangelising processes with children and young people. At the same time, it allows more people to get to know the Marist charism and to take it on as a way of living their Christian vocation and planning their life.

This greater emphasis on formation programmes increased the number of people who know and experience the Marist charism and thus results in the expansion of the Marist charismatic family. As a consequence, the opportunities for the realisation and expansion of the Marist mission also intensify.

d. Institutional Support for Leadership Development

The fourth strength of leadership formation processes identified by the study participants was the institutional support provided for the development of Marist leadership. The increased offer of leadership formation programmes, the accompaniment of new leaders of the Administrative Units, the sharing of best practices and the availability of human and financial resources are all concrete factors allowing Global Marist Leaders to identify growing institutional support for leadership development.

Furthermore, in the perception of part of the Global Marist Leaders, the Institute was visibly committed to ensuring that the Administrative Units and Regions have proper access to leadership formation programmes. To this end, the Institute is promoting formation programmes at the international and regional levels through its Secretariats and the General Council itself, as well as supporting initiatives within the Administrative Units.

The accompaniment of the leaders of the Administrative Units is an important element in leadership formation. According to many AU Marist Leaders, the General Administration of the Institute's close and continuous accompaniment of the Provincial Superiors and District Leaders, as well as that of Marist life and mission, has markedly improved. Significant effort has also been made to guarantee human and financial resources for the development of leaders, especially in the most vulnerable regions.

As such, the support for leadership development is enabling the Administrative Units to expand their leadership capacity, particularly directed towards the Marist life and

mission processes. As a result, a substantial impact is expected for the vitality of the Marist charism.

In conclusion, it could be argued that the four current strengths of Marist leadership formation processes are essential to the future of the charism, and that it is fundamental for the Institute to continue all these initiatives, and others, that favour the formation of prophetic and collaborative leaders committed to the development, strengthening and continuity of Marist life and mission.

8.2.2 Challenges for Marist Leadership Formation Processes

Based on the contributions of the participants involved in this study, it was possible to identify five main challenges related to Marist leadership formation processes, namely: *defining clear guidelines for the development of Marist leaders, improving the quality of leadership formation programmes, building leadership capacity, strengthening the co-responsibility of brothers and laypeople for the Marist life and mission, and greater availability of resources for leadership development*. Although these same challenges were identified by both Global Marist Leaders and AU Marist Leaders, specific nuances were presented by each of the two groups involved in the research project.

a. Defining Clear Guidelines for the Development of Marist Leaders

The first challenge identified regarding Marist leadership development processes was the need to define clear guidelines for leadership formation. For the study participants, a proper plan for leadership development was lacking. In particular, the greater part of the Global Marist Leaders has found the management of leadership formation to be weak. For the majority of the AU Marist Leaders, leadership formation and mentoring programmes should be better promoted.

For many AU Marist Leaders, the lack of a plan with clear guidelines for leadership development ends up compromising the formation of leaders in many Administrative Units. A number of AU Marist Leaders believed that not all Marist realities are sufficiently competent to develop formation programmes on their own. For some, leadership formation was not yet a priority. The establishment of global guidelines would help to foster and strengthen the formation of Marist leaders in the diverse contexts around the world where the Institute is present. At the same time, it would be an

opportunity to develop a more coordinated and better articulated network between the various Marist contexts.

The management of leadership formation was another challenge highlighted by the research participants. For some Global Marist Leaders, it was necessary to allocate sufficient human and financial resources for guaranteeing follow-up, proper communication and solid accompaniment for the leadership formation processes at all levels of the Institute. Better management would enable pre-existing leadership formation programmes to be strengthened, the most marginalised regions to be further developed and leadership accompaniment to be improved.

This study participant feedback demonstrated that clear guidelines and efficient management of leadership formation programmes could help the Institute to build a network of highly competent leaders, capable of carrying out its mission and promoting the Marist charism.

b. Improving the Quality of Leadership Formation Programmes

Improving the quality of formation programmes was the second challenge identified for Marist leadership formation processes. While many of the participants recognized the advances in the quality of formation programmes, as already mentioned in the previous sub-section regarding strengths, they also believed there were still steps to be taken for the formation programmes to best respond to the real needs of Marist leadership and the Institute.

For many of the AU Marist Leaders, improving the quality of formation programmes was necessary. For those leaders, the need to balance more the formation in the Marist charism with the professional development of leaders was paramount. By comparison, many of the Global Marist Leaders observed a poor balance between theory and practice in current leadership formations programmes, arguing that the content in these programmes must be updated, and that joint formation of Brothers and Lay Marist be strengthened.

For the study participants, a higher quality of leadership formation programmes would significantly impact leaders on both the personal and professional levels. On a personal level, it would contribute to leaders' holistic development by fostering a healthy balance between their mental, psychological, spiritual, social and human selves. On the professional level, it would contribute to leaders' improved understanding of the elements

of Marist identity, a mastery of the necessary tools for exercising their leadership, and greater efficiency in carrying out their mission. All this would ultimately contribute to the strengthening of Marist values and mission.

c. Building Leadership Capacity

The development of leadership capacity in all spheres of the Institute appeared as a great challenge and concern for study participants, especially on the part of the Global Marist Leaders. For these leaders, there was a consensus regarding the sharp reduction in the number of vocations to Marist religious life, the aging of the current population of Marist Brothers and the poor preparation of the laity for the various facets of the Marist life and mission, which generates a lack of leadership capacity throughout the Institute.

According to the larger part of the Global Marist Leaders, many Administrative Units do not have leaders who are adequately prepared enough to carry out their functions. Others have difficulties in performing their leadership roles concerning the various facets of the processes, initiatives, and projects of Marist life and mission undertaken in some of the Provinces and Districts. Likewise, for regional and global initiatives, the Institute faces difficulties in finding leaders who meet the necessary requirements for achieving what is requested of them.

For some AU Marist Leaders, the Institute will need to make a greater effort to attract and form leaders who can cope with the different realities of the Marist charism. In addition, they stated that it would be essential to strengthen Marist leadership formation processes. In this context, formation and the delegation of authority to the laity, in all spheres, especially those aspects relevant to the Marist mission, will become increasingly important.

d. Strengthening the Co-responsibility of Brothers and Laypeople for Marist Life and Mission

As the presence of the Brothers is diminishing and that of the laity is increasing, the research participants recognise that greater co-responsibility of the laity regarding the Marist charism is essential to the vitality and sustainability of Marist life and mission. Many Global Marist Leaders and AU Marist Leaders all recognised the laity as heirs to the charism. According to most of the Global Marist Leaders, it was of the utmost importance to ensure that Lay Marists possess the knowledge of and are committed to the

Marist charism, and that this be achieved through experiences and formation processes which can help the laity understand and interpret the Marist charism in their reality. Likewise, joint pathways must be sought for Brothers and laity to guarantee the future of Marist life and mission together.

An impressive number of the AU Marist Leaders have demonstrated the importance of continuous work in raising awareness and preparing the Brothers and laity for this new reality. For these leaders, co-responsibility for the Marist life and mission must be based on communion, mutual support and a common commitment to the vitality and continuity of the charism. Greater co-responsibility of Brothers and laity in all areas of the Marist life and mission can contribute to a Marist leadership framework that is better prepared to face the challenges and opportunities of the charism in today's world.

e. Greater Availability of Resources for Leadership Development

According to the study participants, while much progress had been made in mobilising resources to ensure adequate Marist leadership formation, the allocation of human and economic resources still remains urgent in many parts of the Institute.

Many Global Marist Leaders have expressed how urgent it was for all contexts where the Institute is present to be able to offer quality formation for their Marist leaders. In their view, some Administrative Units have no economic autonomy nor specialised human resources which are dedicated to the development of leadership formation initiatives. Therefore, greater support from the Institute is needed to ensure that these different contexts can guarantee adequate formation for Marist leaders.

In the vision of the majority of the AU Marist Leaders, if common policies and institutional guidelines underpinned by solidarity and support could be adopted by the Administrative Units, all Marist realities might be able to guarantee quality leadership formation. Some contexts where the Institute was present have sufficient human and economic resources, and even the capacity to support others who are in much need of these resources. However, the General Administration of the Institute would have to actively negotiate and coordinate in order to favour this type of support and collaboration.

Addressing the challenges of leadership formation processes can contribute significantly to the quality and performance of Marist leaders. Moreover, addressing these challenges would also encourage leaders to engage more with the Marist charism, contributing to a better vigour of the Marist life and mission.

8.2.3 Opportunities for Marist Leadership Formation Processes

The main opportunities identified for developing Marist leadership formation processes included institutional awareness of the urgent need for Marist leadership development, greater knowledge of Marcellin Champagnat's impact upon Marist life and mission, the institutional understanding of a global, prophetic and collaborative leadership and a greater sense of a charismatic global family. These findings are the outcome of a transversal analysis of the research participants' contributions to the study, rather than deriving from answers to any explicit questions put to participants per se.

a. Institutional Awareness of the Urgence Need for Marist Leadership Development

Based on insights from Global Marist Leaders and AU Marist Leaders, it became very clear that the urgent need for the development of Marist leadership is something all levels of the Institute are aware of. Many Global Marist Leaders commented on the difficulties of finding qualified leaders for the challenges facing the Institute today and the significant crisis of Marist vocations. The majority of the AU Marist Leaders pinpointed the lack of adequately prepared leaders, arguing this will directly impact the future of the Marist life and mission in many parts of the world.

This institutional awareness might be viewed as a great opportunity for the Marist Institute's different levels of government and management to take initiatives that can promote the development of Marist leadership. Those in charge of such formation initiatives would have the support of a large portion of the Marist community.

b. Greater Knowledge of Marcellin Champagnat's Impact on Marist Life and Mission

The second opportunity identified by the participants was the greater recognition of the impact of the person of Marcellin Champagnat among those collaborators involved in Marist life and mission. As presented in Chapter Six, 68.42% of the AU Marist Leaders said that the impact of Marcellin Champagnat is well known among those involved in Marist life and mission.

For these leaders, studies that have been conducted on Marcellin Champagnat and the first Marist Brothers in recent decades, as well as the dissemination of these studies using new technologies, have provided more people with access to relevant information,

promoting a better understanding of the foundations of the Marist charism and the Institute. For a significant number of the Global Marist Leaders, many collaborators who come into contact with the history and work of Marcellin Champagnat feel challenged to deepen their knowledge and commitment to the Marist charism. In this sense, the Institute is able to identify collaborators who show particular interest in broadening and deepening their knowledge of Marist life and mission and prepare them for greater commitment and leadership.

c. The Institutional Understanding of a Global, Prophetic and Collaborative Leadership

The study revealed that the participants have a solid understanding of what constitutes prophetic and collaborative global leadership, which favours the development of a leadership profile that is committed to the vitality and continuity of the Marist charism.

For many AU Marist Leaders, a global leader, regardless of whether he or she is fulfilling a global or local role, could be identified because of their global mindset approach and the impact of their actions. Furthermore, a prophetic and collaborative global leader operated as part of a network, with the Gospel serving as an inspiration and foundation for his or her life and mission. At the same time, global leaders were able to synthesise both history and the present moment in order to move towards the future.

Although the Global Marist Leaders were not questioned directly on this theme, it is possible to identify, from the insights they shared, a vision of Marist leadership that was prophetic and servant. A substantial number of the Global Marist Leaders described Marist leadership as having a capacity to influence people and being focused on cooperation. Their vision of the Institute involved a global family articulated in networks, characterised by the shared experience of a deep Christian spirituality. These attributes of the leadership profile identified as part the collective institutional understanding can serve as horizons for developing formation processes for Marist leaders.

d. Greater Sense of a Charismatic Global Family

The greater sense of the Institute as a global charismatic family, as described by the 22nd General Chapter (Institute of Marist Brothers 2017), provided an opportunity to leverage leadership formation in an integrated, co-responsible and global way.

To guarantee the future of the charism, many Global Marist Leaders believe that it is essential that Marist leaders—both Brothers and Lay Marists—receive a formation which aims to develop international hearts and minds that act together as a global body. These Global Marist Leaders have recognised that the future of the Marist charism requires leadership valuing local and global vision and understanding. Likewise, these global leaders identify that future Marist leaders must be capable of fostering the co-responsibility and collaboration of Brothers and Lay Marists, working together to ensure the future of Marist life and mission at all levels of the Institute.

A significant number of the AU Marist Leaders were relying on the General Government of the Institute to better coordinate and encourage the exchange of experiences between different Marist realities, promoting the participation of all those who contribute to the vision of the future of the Marist charism by fostering mutual support and greater solidarity among the Administrative Units. Making good use of the opportunities identified by the Global Marist Leaders and the AU Marist Leaders could significantly contribute to guaranteeing formation processes for Marist leaders that respond to the challenges and needs of the Marist charism in the contemporary world.

8.3 THE ROLE OF THE GENERAL COUNCIL AS A GLOBAL LEADER IN ENSURING THE FORMATION OF PROPHETIC AND COLLABORATIVE LEADERS

This section responds to the specific objective “to examine the role of the Institute of the Marist Brothers’ General Council as a global leader in ensuring the formation of prophetic and collaborative leaders”. According to the participants’ contributions and as displayed following in Table 14, the General Council has five main roles in ensuring the formation of prophetic and collaborative leaders.

**THE ROLE OF THE GENERAL COUNCIL AS A GLOBAL LEADER IN
ENSURING THE FORMATION OF PROPHETIC AND
COLLABORATIVE LEADERS**

1. *Sharing the Institutional Vision and Direction for the Marist Life and Mission*
2. *Defining Leadership Formation Guidelines*
3. *Raising Awareness of the Need for Leadership Formation*
4. *Promoting Leadership Formation Programmes*
5. *Fostering the Attraction and Formation of New Leaders at the Regional and Administrative Unit levels*

Table 14. Role of the General Council of the Institute of the Marist Brothers
Researcher's source, 2021.

1. Sharing the Institutional Vision and Direction for the Marist Life and Mission

For the study participants, it was their view that the General Council has the responsibility to share the vision and the institutional direction of the Marist life and mission to guide the processes of formation of prophetic and collaborative leaders. For a majority of the Global Marist Leaders, it was difficult to plan for the formation of Marist leadership without a shared vision for the future of the charism among all the spheres and segments of the Institute. For these leaders, leadership formation programmes represented an important strategy for building and sharing that vision together. Another aspect highlighted by the Global Marist Leaders was the recognition that a more horizontal and participatory style of government for the Institute could serve as a dynamic force for the future vision and direction of the Marist charism. According to these leaders, in order to further strengthen the Marist life and mission, sharing the Institute's vision and direction with laypeople and young people around the world would have a significant impact.

For many AU Marist Leaders, the vision of Marist life and mission must properly translate the philosophical elements and principles of the Marist charism. Similarly, to the Global Marist Leaders, AU Marist Leaders were of the opinion that formation programmes are unique opportunities for the General Council to build and share the paths the Institute is taking. According to the questionnaire data presented in Chapter Six, 85.96% of the AU Marist Leaders agreed that the formation programmes are contributing

to creating a common vision for the future of the Marist charism. For these leaders, a shared vision and direction would imply changes in attitudes, practices, processes and structures throughout the Institute.

For both groups of leaders, sharing the vision and direction of Marist life and mission will make it easier to join forces, strengthen cooperation and engage more people to ensure the vitality of the charism. For the participants, this was viewed as a shared responsibility of Marist leaders at all levels of the Institute, but the General Council has an essential leadership role in this process because of its global vision of the Institute and its ability to articulate and influence Brothers and laypeople to follow a shared vision and direction.

2. Defining Leadership Formation Guidelines

Regarding the formation of prophetic and collaborative Marist leaders, the research participants identified the General Council's second most important role as defining guidelines for the formation of Marist leadership. For a large number of the Global Marist Leaders, guidelines for leadership formation should be inspired by the vision and institutional direction of the Marist life and mission. For many AU Leaders, the Institute's vision of a prophetic and collaborative leader must take into account the cultural and ecclesial diversities such concepts can present for the different Marist contexts around the world. These leaders believe this complexity must be taken into consideration when defining leadership formation guidelines.

For some Global leaders, guidelines for institutional leadership formation policies should ensure high quality, up-to-date Marist leadership formation processes across all strata and levels of the Institute. These guidelines should consider both Brothers and laity and address the leaders' charismatic and professional formation. Likewise, guidelines should encompass not only formation programmes, but also personalised accompaniment processes for each leader across their entire cycle of preparation, development and completion of his or her mission.

In most AU Leaders' vision, guidelines should ensure high quality formation processes across all realities where the Institute is present, as well as contributing to strengthening those processes wherever they may be particularly fragile. For many of these leaders, guidelines should also consider the content of the formation programmes, needs, methodologies, modalities, structures, resources, financing, certification and

preparation of formators, according to each local reality. A high number of the AU leaders signalled the exchange of experiences regarding the Marist life and mission and best leadership practices as important elements acquired.

3. Raising Awareness of the Need for Leadership Formation

Raising awareness of the need for Marist leadership formation at all levels of the Institute is another role related to the General Council. For the study participants, greater awareness of the importance of preparing leaders who can face the challenges of the Marist charism was urgently needed, particularly considering the continuous reduction in the number of Marist Brothers and the fact that lay formation processes are still at an embryonic phase for much of the Institute. The questionnaire used for this study revealed that 52.63% of AU Marist Leaders do not agree that current processes of leadership formation are adequately meeting the current needs of the Brothers or the laity.

For the majority of the Global Marist Leaders, the General Council must work with leaders at the various levels of the Institute to ensure their commitment and efforts in preparing and developing leadership. At the same time, the Global leaders considered that it is critical that these processes of leadership development have greater oversight by the General Council. For these leaders, creating a new institutional language to discuss and develop formation processes, as well as reviewing current formation programmes and finding ways to show the impact this can have for the future of the Marist charism, is paramount.

For many AU Marist Leaders, greater human and financial resources for local leaders from the General Council require allocation to ensure leadership formation, especially at the level of the Administrative Units and Regions. In this context, a major challenge will be to work with Marist realities where leadership capacity is already compromised. However, there will be no significant progress in the formation of Marist leadership without an institutional awareness of this need.

4. Promoting Leadership Formation Programmes

The research participants identified the promotion of leadership formation programmes as another important role of the General Council, particularly given that not all Administrative Units and Regions had developed systematic leadership formation programmes. Additionally, as already demonstrated in this study, 63.16% of AU Marist

Leaders did not agree that those involved in the Marist mission have an in-depth knowledge of the Marist charism.

For more than half of the Global Marist Leaders, it was felt that the General Council should ensure the development of formation programmes at all levels and areas of the Institute. In this regard, it will be necessary to have teams of specialists present and active in planning and implementing formation programmes throughout the various sectors of the Institute. It is a matter of sharing and building common elements for the formation programmes, while defining what is specific to each level and sector and choosing the most appropriate methodologies for programmes development.

A great number of the AU Marist Leaders confirmed the need for the General Council to be more engaged with those in charge of the Administrative Units and Regions to provide and qualify leadership formation programmes. Establishing guidelines and providing facilitators would be an important contribution to promoting formation programmes. These leaders pointed out the need to train formators for the planning and implementation phases of Marist leadership programmes which should emphasise the elements of Marist identity and the development of leadership skills.

According to the research participants, increasing the offer of leadership formation programmes would result in a significant boost in the vitality of the Marist life and mission in the various contexts where the Marist charism is present around the world.

5. Fostering the Attraction and Formation of New Leaders at the Regional and Administrative Unit levels

For many Global Marist Leaders, it was the responsibility of the Administrative Units and Regions to ensure continuous processes of attraction and development of Marist leadership. They also believed that the Administrative Units and Regions must ensure that all leaders engaged locally in Marist life and mission have the necessary and appropriate accompaniment and formation for the exercise of their mission. To this end, the close and active support of the General Council for the leaders of the Administrative Units and Regions is crucial.

For many AU Marist Leaders, better cooperation between the General Council and the Regions and Administrative Units would enable a better offer of formation programmes and an increase in the number of participants. In the view of the majority of these leaders, for those Administrative Units and Regions suffering greater difficulties regarding human and financial resources, the General Council should identify ways to

cooperate with other Regions and derive greater support from funding agencies and other international bodies in order to promote leadership formation.

In the perception of the research participants, working together at the level of the Administrative Units could result in improved attraction and preparation processes for new leaders, since they would respond better to the local needs of each Marist reality. However, this effort would be worthless without the engagement and mobilization of the General Government and the regional leaderships.

8.4 ESSENTIAL ELEMENTS NECESSARY FOR THE FORMATION OF PROPHETIC AND COLLABORATIVE GLOBAL LEADERS COMMITTED TO THE VITALITY AND CONTINUITY OF THE MARIST CHARISM

In this section, the findings related to the general objective of this study which deals with the essential elements necessary for the formation of prophetic and collaborative global leaders will be introduced. As shown in Table 15, nine different essential elements pertaining to the formation of Marist leadership have been identified.

ESSENTIAL ELEMENTS NECESSARY FOR THE FORMATION OF PROPHETIC AND COLLABORATIVE GLOBAL LEADERS COMMITTED TO THE VITALITY AND CONTINUITY OF THE MARIST CHARISM
<ol style="list-style-type: none"> 1. Fostering a Process of Deep Spiritual Renewal 2. Promoting Greater Knowledge of the Marist Charism 3. Building a Shared Vision and Direction for the Marist Charism 4. Defining the Place and Role of Brothers and Laity in Marist Life and Mission 5. Strengthening the Communion and Co-responsibility of Brothers and Laypeople for the Marist Charism 6. Defining Institutional Policies and Guidelines for the Formation of Marist Leadership 7. Ensuring the Accompaniment of Marist Leaders 8. Strengthening Leadership Formation Processes 9. Attracting and Preparing New Leaders

Table 15. Essential Elements Necessary for the Formation of Prophetic and Collaborative Global Leaders
Researcher's Source, 2021.

6. *Fostering a Process of Deep Spiritual Renewal*

Spiritual renewal was acknowledged by the study participants as a central element for the formation of prophetic and collaborative global leaders. For them, the formation of leaders committed to the future of the Marist charism will be difficult without a process of profound spiritual renewal.

For many global leaders, the spiritual dimension was part of the essence of the Marist charism. Therefore, it is essential that Marist leaders be offered the opportunity to deepen this spiritual dimension in the light of Christian, Catholic and Marist principles. A process of spiritual reflection and renewal will allow for the formation of leaders who have better knowledge of the charism, of themselves, of the mission with which they have been entrusted. Moreover, these leaders felt that this spiritual renewal should be based on the principle of mercy and engage both Brothers and Lay Marists. For Global Marist Leader 5, spiritual renewal will not be:

achieved without a deliberate process of deepening the Gospel, of work, of discernment of approaching the merciful heart of God, of discovering these guidelines, these elements of life in one's own personal life, in the life of the community, in the apostolic life.

Likewise, for a large part of the AU leaders, spirituality was seen as a key element in the formation of Marist leadership. For AU Marist Leader 57, “the development of a Christian and Marist spirituality was urgent, as is the need for greater spiritual maturity among leaders”. Thus, for many AU leaders, the promotion of spirituality and interiority was an important part of leadership formation programmes. These leaders stressed the need to develop an incarnated spirituality that integrates the human being in his or her totality and contemplates his or her entire history, rooted in the early Marist years, and which was at the same time relevant and attractive to the present generation. For some AU leaders, spiritual formation should foster an in-depth experience of God and Mary through itineraries of development and spiritual accompaniment.

7. *Promoting Greater Knowledge of the Marist Charism*

According to the participants, promoting greater knowledge of the Marist charism was one of the essential elements for the formation of prophetic and collaborative global leaders who can contribute to the vitality and continuity of the charism. Field work revealed that only 40.35% of the AU Marist Leaders who participated in this study agreed

that lay Marists had deep knowledge of the charism. Furthermore, only 36.84% of these leaders agreed that collaborators working directly with the Marist mission have a profound knowledge of the Marist charism. Considering that lay leadership was a key factor for the future of the charism, formation in the charism for these leaders becomes essential.

For the majority of the Global Marist Leaders, it was urgent to build a common vision of the Marist charism. Marist leaders have a crucial role in spreading the charism, so personalised accompaniment and quality formation processes must necessarily guarantee their in-depth knowledge of the charism. The leaders' ownership of the foundational elements of the charism would provide a style of leadership based on Marist principles and values. It would, in their view, also help leaders to become better prepared to face the current challenges of Marist life and mission. Greater knowledge and concrete experiences of the Marist charism could contribute to leaders being inspired by the Marist charism as a way to live their Christian vocation.

For a large number of the AU Leaders, formation was the most effective strategy to help Marist leaders reach the core of the Marist charism, as it could guarantee the necessary knowledge and experience related to Marist life, mission and spirituality. Opportunities to get to know the foundational and historical places of the charism through visits or access to research and publications can be sources of inspiration and an opportunity to deepen one's commitment to the charism.

For the research participants, the dissemination of knowledge of the Marist charism was of vital importance for its future. To this end, the formation and commitment of Marist leaders becomes paramount. Knowledge of the charism across all segments and spheres of the Institute will strongly contribute to revitalising Marist life and mission.

8. *Building a Shared Vision and Direction for the Marist Charism*

Establishing a clear vision and shared direction for the future of the Marist charism allows leaders to better plan their mission and to prepare themselves and their followers to move together in this direction. For all the Global Marist Leaders, formation programmes were essential for developing the vision and direction of the charism's future. According to field research data, 85.96% of the AU leaders agreed that current formation programmes contributed to creating a vision for the future of the charism. However, they also stated that the formation programmes carried out today at the various

levels of the Institute are insufficient to ensure that they are shared by the greatest number of leaders.

For several global leaders, it was very important that this vision not be restricted to the Institute's spheres of government and management, but also be shared with all the Brothers, laypeople and young people—in short, all those involved in Marist life and mission. In this sense, some global leaders have recognised that, together with formation programmes, the opportunity to live the experience of the charism should be offered to all those who are interested in deepening their understanding of it. This would allow that from the different experiences and perspectives it would be possible to build a common, inspiring and feasible vision of the charism.

For a great part of the AU Marist Leaders, promoting a shared vision and direction of the charism would engage, inspire and motivate all stakeholders. It would allow those leaders to better foresee potential social, economic, religious, educational and youth situations which may affect them and allow them to build common strategies to respond to these challenges.

For the research participants, this made communicating the vision and direction of the future of the Marist charism to all those involved in Marist life and mission, as well as with partners of the Institute, evermore relevant. The more the vision and direction are shared, the more stakeholders will have the capacity to influence people to commit themselves to realising the Marist charism. To this end, the role of the leader who is committed to the vitality and future of the charism is essential.

9. Defining the Place and Role of Brothers and Laity in Marist Life and Mission

The definition of the place and role of Brothers and lay Marists is indispensable in the present scenario of the Marist charism. As previously noted, while there is a significant reduction in the number of Marist Brothers in the Institute, there is also a growing number of laypeople who identify with the Marist charism. Therefore, the definition of the place and role of Brothers and lay Marists is indispensable in securing the vitality of the Marist charism both now and in the future.

Faced with this reality, a predominant group of the Global Marist Leaders understand that Brothers and laity have the same leadership and co-responsibility roles for Marist life and mission, with no distinction in their commitment to the Marist charism. In the vision of the global leaders, Brothers and Laity share the same vocation, albeit with

differences in the way they live it. Therefore, all are called to find their place in the Marist life and mission as the fulfilment of their Christian vocation.

A significant number of Global Marist Leaders have recognised, however, that the Brothers have a role to play among lay Marists as an inspiring presence of the Marist charism and in supporting the formation, mentoring and accompaniment of the laity. These global leaders also believe that the Brothers' presence should be privileged in contexts that foster their direct contact with children and young people in the different fields of the Marist mission.

For more than half of the AU leaders, the place and role of Brothers and laity were viewed complementary. For them, it was important to make an effort to value, support and promote their vocations and to respond together, on equal terms, to the challenges to Marist life and mission. Some AU leaders recognise that there were still many challenges to be overcome and processes to be carried out for the full understanding of this new reality. For this reason, the study participants consider it essential that the formative processes of leadership contribute to the discernment and better definition of the place and mission of Brothers and laity in the context of the new reality of the Marist charism.

10. Strengthening the Communion and Co-responsibility of Brothers and Laypeople for the Marist Charism

Communion and co-responsibility for the charism are two important elements in the development of Marist leadership. According to the study participants, in recent years the Institute had taken many steps towards understanding and strengthening these two themes, however, they also recognise that there is still much to be achieved, most of which was of an urgent nature.

Regarding the theme of co-responsibility, the results of the questionnaire demonstrated that 82.46% of the AU Marist Leaders questioned agreed that a high degree of co-responsibility exists between Brothers and laity in relation to the Marist mission. However, when referring to Marist life, only 54.38% agreed. This data revealed that in the mission—where there was a greater number of committed laypeople—the perception of co-responsibility is greater. In relation to Marist life, the percentage demonstrated that there is less involvement of the laity and, therefore, the participants are less convinced of the co-responsibility.

For the majority of the global leaders, greater co-responsibility for the charism between Brothers and laypeople will have a significant impact on the dynamism and

vitality of Marist life and mission. According to these leaders, it was too important to explore the mindset of both Brothers' and laypeople in relation to their commitment to the charism and their engagement with it. The greater the communion of Brothers and laity in relation to the charism, the more promising the charism's horizon will be.

In the view of some AU Marist Leaders, communion and co-responsibility for the charism are the fruit of processes of formation, awareness, empowerment and bold decisions taken by the Institute. For these leaders, a leader plays a key role in making this happen. Formation programmes regarding the charism, as well as opportunities to have concrete experiences of community life and spirituality and initiatives surrounding the Marist mission, contribute to a process of greater identification and commitment in building a common future for the Marist charism.

For the study participants, the strengthening of communion and co-responsibility between Brothers and laity for the Marist life and mission became strategic for the formation of prophetic and collaborative global leaders who could ensure a promising future for the charism.

11. Defining Institutional Policies and Guidelines for the Formation of Marist Leadership

The definition of policies and institutional guidelines for the formation of leadership is essential for ensuring the proper formation of Marist leaders. In the view of the participants, the absence of clear policies and guidelines for the formation of leaders was one of the elements contributing to the lack of leadership capacity in many realities of the Institute.

For many Global Marist Leaders, the General Council was considered responsible for defining policies and guidelines for leadership formation throughout the entire Institute. Such overarching policies and guidelines would ensure that leadership formation processes are developed across all contexts where the Institute is present, as well as contributing to greater cooperation and solidarity among Administrative Units and Regions regarding Marist leadership formation processes.

According to a great number of the AU Marist Leaders, the lack of a common orientation and direction across the various areas of Marist ministries and realities contributed to the unevenness of leadership formation as well as the development and sustainability of the Marist mission around the Institute. For these leaders, establishing common guidelines and directives could contribute to ensuring the formation of leaders

who were strongly committed to the Marist life and mission, bringing new dynamism to the charism. Adopting formation policies and guidelines that were properly communicated and undertaken at all levels of the Institute could be a real “game changer” in ensuring a quality formation for Marist leadership everywhere.

12. Ensuring the Accompaniment of Marist Leaders

As has already been noted, the formation of prophetic and collaborative global leaders was essential to the vitality of the charism. Consequently, personal and professional accompaniment of Marist leaders was one of the most important elements in the vision of the study participants.

Reflecting on their own experience of leadership development, a considerable number of the Global Marist Leaders valued this type of accompaniment. Among the main elements these leaders highlighted as valuable for formation are mentoring and the example of previous leaders. The close accompaniment by more experienced leaders had guaranteed them greater security, self-knowledge and provided them with a critical analysis of their performance of their mission. Similarly, the example of previous leaders provided the Global Marist Leaders with inspiration and understanding, not only in relation to Marist life and mission, but also to guide their own lives and actions based on the Marist charism.

For a majority of the Global Marist Leaders, the accompaniment of Marist leaders became even more urgent in a context where the Institute’s leadership transition is characterised by the empowerment of lay Marists. For these global leaders, ensuring the appropriate formation and accompaniment processes that help leaders in their personal, professional and spiritual development was a key priority. In this regard, these leaders recognised the need to properly prepare Brothers and laity throughout the different sectors of the Institute and to guarantee the infrastructure and resources necessary for the accompaniment of Marist leadership in its various stages of development and action.

For a large number of the AU Marist Leaders, greater accompaniment of Marist leadership would contribute to the formation of leaders who are more competent, consistent and committed to the charism. These Marist leaders also emphasised the need for leaders to be able to count on people who had been properly prepared to help in their accompaniment, be they internal or external to the Institute. For this reason, many AU Marist Leaders pointed out the importance of defining accompaniment itineraries and

suggested that Marist Brothers could assume an essential role in mentoring and accompanying leaders based on their own experience of the charism.

Therefore, for study the participants, the close, high quality, professional and systematic accompaniment of Marist leadership, associated with formation processes that had been adapted to suit the context of today's world, will contribute in a unique way to the formation of leaders that are fully committed to the future of the Marist life and mission.

13. Strengthening Leadership Formation Processes

The study participants recognised recent advances across various levels of the Institute with respect to improvements made in the quality of leadership formation processes. However, they expressed how formation processes were not yet sufficient to prepare leaders who were capable of synthesising and developing ways to face the Marist charism's contemporary challenges.

For a wide group of the Global Marist Leaders it was considered that formation processes must cultivate leaders' curiosity about the world around them. In addition, formation processes must have an anthropological, theological and uniquely Marist approach that helps leaders to integrate faith and life, theory and practice, as well as developing a global consciousness and opening themselves to multicultural experiences, to working with others, to respecting diversity and to taking risks. Formation processes should also help leaders to make a spiritual and vocational interpretation of their mission, challenging leaders to go beyond organisational limits or interests. At the same time, leaders must focus their mission on respecting and promoting the dignity of all human beings.

Many AU Marist Leaders also confirmed the need for a broader and more holistic approach to the formative processes of leadership. To this end, these leaders recognised the value of focusing attention on several elements, including programmatic content, the spiritual dimension, greater deepening of the mission, sharing of experiences and new mission language. The joint formation of Brothers and laity was seen as an important opportunity for promoting mutual support and exchange in transmitting and building a common vision of the Marist charism.

To respond to all this, the study participants identified the need for better systematisation, direction and recognition of formative processes by universities and

other academic institutions. In this way, the strengthening of formation processes can give a new impulse to the Marist charism through the formation of leaders who are committed to its vitality and continuity.

14. Attracting and Preparing New Leaders

Finally, the attraction and preparation of new leaders was considered strategic for the future of the Marist charism. In the opinion of the study participants, the attraction and formation of leaders needed to be a systematic and ongoing process to ensure the participants' capacity for leadership and the enrichment and innovation of Marist life and mission through the leaders' contributions.

For the vast majority of the Global Marist Leaders, the attraction of leadership must be more focused within the Administrative Units, as well as within the Regions for their proximity to local realities and their capacity to attract and inspire new leaders to engage with the charism. The processes of selecting new leaders should include both men and women, Brothers and lay Marists, and should involve both internal and external methods of selecting leaders which is in full harmony with the processes of the Marist vocation ministry.

A large number of the global leaders identified mentoring as an essential part of accompanying new leaders, enabling them to better discern their mission, exchange knowledge of their mutual competencies, and develop their skills. These leaders found that mentoring also promotes better awareness of the institutional expectations for their leadership and a deeper immersion in the charism. The attraction and formation of new leaders also becomes an opportunity to form prophetic and collaborative global leaders with greater potential to act in emergencies and to respond to the needs of the charism in the contemporary world.

For many AU leaders, the processes of attraction and formation of leaders must consider the life cycle of leaders in the institution. Therefore, detailed planning was important to ensure transparency, as well as communicating the expectations and conditions that pertain to the exercise of their leadership. Leadership selection processes must be conducted very carefully, guaranteeing that those people selected are prepared and willing to commit themselves to the Marist "world".

For these leaders, the phases of initiation, development and finalisation of leaders' work must be very clear to both the leader and the Institute. This would avoid future

problems and favour the renewal of the leadership cadre in a harmonious and mutually upon agreed fashion. Throughout the process, it was important to ensure periodic evaluation and empowerment of leaders with experiences and leadership formation within the Institute or in other organisations.

The presence of new leaders and the skills and ideas these leaders would bring with them allows for the renewal and greater dynamism of the Marist life and mission. For these case study participants, a clear vision of the desired leadership profile and the leaders' place and role in the Institute is important for the success of the attraction and formation processes for leaders.

8.5 CONCLUSION

The findings of this case study research project, which uses a mixed methods approach, enabled a response to the question: “what are the essential elements for the formation of prophetic and collaborative global Marist leaders needed to ensure the vitality and continuity of the Institute of the Marist Brothers' charism”?

The study revealed nine essential elements, as presented in the previous section, which the Institute must consider in order to ensure the formation of leaders who are committed to the future of the charism. The identified elements permeate many aspects of the processes, policies, structures, and resources that are part of leadership formation. They also impact on the necessary leadership skills, mind-set, decisions making capacity, and the vision for the future of the charism and the Institute. Similarly, these elements reflect the need for a proposal for the formation of Marist leadership that is procedural, systematic and bold, so as to enable the Marist charism to remain current and to contribute to the education and evangelisation of children and young people around the world.

The study findings are all the more relevant in the face of the reduced leadership capacity of the Marist Brothers and greater empowerment of the laity in all areas of Marist life and mission. This reality is the result of the Institute's current crisis of a lack of Marist Brothers' vocations and of the greater participation and presence of the laity in the mission of the Church since Vatican II. This presence and participation also have enhanced the laity's own understanding of their place in the life and mission of the Church and other religious institutions.

On the basis of these circumstances, it was also possible to identify the strengths, challenges and opportunities for Marist leadership formation processes, since they serve

as parameters for leadership formation initiatives. The study also pointed to the global leadership role of the General Council, which should ensure the adequate and necessary formation across all levels of the Institute.

The elements described in this chapter can contribute significantly to improving the Institute's leadership capacity across all fronts of the Marist life and mission. Executed appropriately and consistently, these elements can also ensure the formation of prophetic and collaborative global leaders who are committed to the vitality and continuity of the Marist charism.

CHAPTER NINE

CONCLUSIONS AND CONSIDERATIONS FOR FURTHER INVESTIGATION AND REFLECTION

9.1 INTRODUCTION

This chapter presents the conclusions drawn from the findings of the mixed methods case study on the issue: “What are the essential elements for the formation of prophetic and collaborative global Marist leaders needed to ensure the vitality and continuity of the Institute of the Marist Brothers’ charism”? The chapter is organised into four different sections so as to best present the research findings according to the posited problem and objectives: the first section highlights research conclusions, the second section presents recommendations to respond to research findings, the third section lists research limitations, and finally, the fourth section offers suggestions for future research regarding the deepening of prophetic and collaborative global leadership.

9.2 CONCLUSIONS: A HOPEFUL FUTURE

In order to respond to the research question, the mixed methods case study aimed to explore the essential elements necessary for the formation of prophetic and collaborative global leaders who are able to ensure the vitality and continuity of the charism of the Institute of the Marist Brothers (Institute).

Based on the quantitative and qualitative analysis of an online questionnaire addressed to 57 Marist Leaders of Administrative Units (AU Marist Leaders) from 23 different countries, and on the qualitative analysis of semi-structured face-to-face interviews conducted with eight members of the General Council (Global Marist Leaders) from six different countries, as explored in Chapter Eight, a series of conclusions were drawn which encompass:

1. *The promotion of greater knowledge of the Marist charism;*
2. *The construction of a shared vision and direction of the Marist charism;*
3. *The promotion of a deep spiritual renewal;*

4. *Defining the place and role of Brothers and laity in the Marist life and mission;*
5. *The strengthening communion and co-responsibility of Brothers and laity for the Marist charism;*
6. *More formal institutional policies and guidelines for the formation of Marist leadership;*
7. *The accompaniment of Marist leaders;*
8. *Strengthening of the processes of leadership formation for those engaged in the Marist mission;*
9. *Developing and forming new leaders.*

Each is an essential element for the formation of prophetic and collaborative global leaders which could ensure the vitality and continuity of the Marist charism. Once put into practice, these elements can contribute to improving the Institute's leadership framework at all levels of the Marist life and mission.

The study also examined the global leadership role of the General Council in ensuring the formation of prophetic and collaborative leaders and identified current strengths, challenges and opportunities for leadership formation processes.

The General Council has five important roles to play in ensuring the formation of Marist leaders for the future of the Marist charism: sharing the institutional vision and giving direction to the Marist life and mission; setting guidelines for the formation of leaders; raising awareness of the need for leadership formation; promoting leadership formation programmes; and encouraging the attraction and formation of leaders at regional and Administrative Unit levels.

In addition, participants recognise that there have been efforts and advances made in leadership formation processes. From the analysis engaged, it was possible to distinguish the increase in the quality and number of formation programmes; the implementation of formation programmes at regional and Administrative Unit level; the development of formation programmes with an emphasis on the Marist charism; and institutional support for leadership development as strengths in the formation of leaders. Conversely, the following challenges remain for the formation of prophetic and collaborative global leaders: the implementation of guidelines for the development of Marist leaders; the improvement of the quality of formation programmes for leaders; the development of leadership skills; the strengthening of the co-responsibility of Brothers

and Laity in Marist life and mission and the greater availability of resources for leadership development.

Five important opportunities that the Institute can capitalise upon favourably for strengthening leadership formation were observed: institutional awareness of the urgency of developing Marist leadership; greater knowledge of the impact of Marcellin Champagnat on Marist life and mission; institutional understanding of prophetic and collaborative global leadership; and a greater sense of a global charismatic family. These are all elements that can open paths and favour the Institute's initiatives to ensure the formation of leaders who can bring new dynamism to the charism.

The study findings indicate that although progress is being made, there is still a need for considerable commitment on the part of the Institute to provide sufficient Marist leadership formation and, to achieve this, articulation must occur at all levels of the Institute, and commitment must be made by Brothers and lay Marists engaged in Marist life and mission. If all these elements are properly considered, they can contribute in a decisive way to ensuring the proper formation of the Institute's leadership, and thus the future of the charism. It is evident that in order to maintain the Marist charism, significant commitment is crucial to ensure that the formation of Marist leaders promotes deeper knowledge of the Marist charism, through which leaders can develop and improve their skills to carry out the mission entrusted to them.

These findings derive from this study's profound understanding of the Institute of the Marist Brothers, especially the life of Marcellin Champagnat, the Marist presence and mission in the world and the history of the Institute, as described in Chapter Two. Furthermore, the study depended on a proper understanding of the Marist charism and the main concepts of leadership, as explored in Chapters Three and Four. The methodology, presented in Chapter Five, facilitated a proper definition of the problem and the essential investigative elements, with the aim of obtaining reliable findings and responding to the current context of Marist leadership in the Institute. The analysis of quantitative and qualitative data, presented in Chapters Six and Seven, enabled the articulation of key findings in relation to the phenomenon, which in turn will be of great relevance for future research in this field and for the Marist Institute.

The findings of this study, therefore, pave the way for the Institute of the Marist Brothers to welcome a new horizon for the future of the Marist charism. The formation of prophetic and collaborative global leaders can strongly contribute to the renewal and revitalisation of the Marist life and mission, as well as to the conceptualisation and sound

approach to this life and mission in the contemporary context. In turn this could allow the Marist charism to remain current, to attract people who identify with it and feel called to live it as a life choice. It may well contribute to the education and evangelisation of thousands of children and young people around the world.

9.3 RECOMMENDATIONS

In the light of what has been presented, it is possible to suggest certain recommendations be considered by the Institute, which can guarantee the formation of prophetic and collaborative global leaders committed to the future of the Marist charism. Those recommendation would include:

1. **Creating permanent channels of dialogue and communication for reflection and exchange on the formation of leaders at all levels of the Institute.** As explored throughout Chapters Six, Seven and Eight, it is extremely important to ensure an institutional commitment to leadership formation by enabling greater articulation through constant and committed communication about the future of Marist life and mission. Consequently, this communication process will favour the development of an Institute-wide awareness of the need for leadership formation.
2. **Giving priority to the formation of Marist leadership in the Strategic Plan of the General Government, as well as those of the Administrative Units and Regions.** These Strategic Plans should anticipate the processes and programmes of formation and accompaniment of leaders at the different institutional levels and for all aspects of Marist life and mission. They should also make explicit the commitment on behalf of the Institute in the development of guidelines and policies that guarantee the formation of leaders. At the same time, strategies envisioned in these Strategic Plans should be assured, with the necessary evaluation, during transitions of government.

- 3. Studying, in conjunction with universities and other Marist and external institutions of higher education, the possibility of a partnership for the development of formation programmes and their certification.** Although the formation programmes, as presented in Chapter Eight, have been properly recognised for their effective leadership development, such partnerships could further contribute to improved systematisation and qualification. At the same time, the academic validation (such as Post-graduate diplomas, etc) would allow greater interest and dedication on the part of participants, as well as better monitoring and evaluation of the programmes and their results. This initiative could strengthen the continuing formation of Marist leaders, as well as ensure the preparation of new leaders.
- 4. Guaranteeing that structures are endowed with the necessary human, material and financial resources at the global, regional and Administrative Unit levels for the formation and accompaniment of Marist leaders.** These structures should ensure leaders' development in full awareness of their proposed trajectory within the institution, that is to say, the beginning, development and end of their mission in the Institute. To this end, a mission plan would be developed for Marist leaders so that their journey of contributing to Marist life and mission is clear and can be planned for. In addition, these structures would guarantee the formation of formators for the support and accompaniment of leaders' formative processes, especially in more precarious realities, and according to their respective level of responsibility.
- 5. Delegating greater responsibility to the laity for the formation processes of Marist leadership.** Considering that the laity represent more than 95% of the those actively committed to the Marist mission, and a growing participation in all aspects of Marist life (General Secretary archives, 2021), it is essential that they also play a greater role in the formation of leaders. The laity's formation and experience in Marist schools, social centres and universities can be of great value for formation processes. Currently, according to the Marist Secretariat of Laity (2021), there is a growing number of laypeople deepening and committing themselves to more fully

living the Marist charism. Together with the Brothers, they feel co-responsible for the future of the Marist charism. The participation of the laity should also consider all formation processes of a Marist Brother.

6. **Promoting new postulants to the Marist Brothers.** The study demonstrates, in Chapters Six, Seven and Eight, the great appreciation and importance of the presence of the Marist Brothers among laypeople and young people, and their support in formation and exchanges regarding the Marist charism. However, the significant reduction and ageing of the current cohort of Marist Brothers, as expressed throughout the research, can compromise this reality. Hence, there is an increasing need to promote Marist vocations. The six hundred and one (601) Marist Schools, twenty (20) Universities and forty (40) Social Centres around the world, as described in Chapter One, provide unique opportunities to welcome young people who feel called to live their lives as Marist Brothers.

7. **Defining the role of the General Council in the formation of Marist leadership.** As evidenced throughout the study, there is a certain lack of understanding regarding the role of the General Council in the formation of leaders, as well as in the Institute. It will therefore be of fundamental importance that an in-depth reflection regarding the role of the General Council is undertaken by the General Government, involving other levels of the Institute, if necessary. As a global leader, the General Council's role must be explicit and known to all in order to guarantee the formation and continuation of the Marist charism. To this end, it will be of fundamental importance to improve the aspects related to the contextual and relational conditions of its mission, as mentioned in Chapter Four.

If the recommendations are realised, advancements towards consolidating the Marist charism could be exemplified by leaders prepared to respond to the challenges and opportunities presented by the contemporary world. They would be positioned to participate in the on-going discussions about the paths that, from now on, will need to be tread for the vitality and continuity of the charism and of the Institute. A quality, universal process of leadership development will guarantee the formation of good leaders

committed to their future. According to Frère Jean-Baptiste, “if ever our dear Institute perishes, it will be through the fault of the Superiors, through the negligence and bad examples of the Brother Directors” (Furet 1869, 15).

9.4 STUDY LIMITATIONS

Research projects are often confronted by certain limitations. In the case of this study, the following limitations were faced:

- 1. The researcher as a member of the General Council.** Some participants may have felt inhibited in expressing their opinions since the researcher is a member of the General Council. From the first point of contact with the participants, the researcher sought to make clear his role as a student and the purpose of the research, intending to make all participants very comfortable about whether or not they chose to participate in the study. Similarly, the researcher being an insider contributed to better understanding the cognitive and emotional precepts of the participants as well as the historical and current contexts of the phenomenon studied.
- 2. Contrasting the study with the experience of another teaching Religious Congregation.** The validity of the study could have been enhanced by a comparative study, contrasting the experience of the Marist Institute with that of a similar group committed to the Catholic Church’s education mission. The findings of this study do, however, have applicability to other teaching Religious Congregations, especially in the context of the declining number of those committed to the vowed life, a situation encountered by the majority of such congregations globally.

9.5 SUGGESTIONS FOR FUTURE STUDIES

In terms of suggestions for future studies, it would be advisable to continue to reflect on how to form prophetic and collaborative global leaders on the five continents, especially regarding formation programmes and accompaniment of leadership in order to ensure the vitality and continuity of the Marist charism. Studies should therefore be carried out to verify the role, not only of the General Council, but also of the leaders of

the Administrative Units, in relation to the charism and the formation of leaders. Also, research could be conducted into the effectiveness of communication channels between the leaders and the mission and commitment of the Brothers and laity in the formation of leaders and the future of the charism. Finally, further investigation could be carried out on the development of leadership capacity in the contexts of the Marist presence where Marist Brothers are no longer present or are in smaller numbers.

With the contribution of future research projects in this area, further understanding of the situation could be promoted, helping to define strategies that can increasingly value and develop the formation of leaders who are co-responsible for Marist life and mission.

9.6 CONCLUSION

The findings of this study may have an important impact on the future of the charism of the Institute of the Marist Brothers. The new moment of greater collaboration of the laity that the Institute is experiencing requires greater preparation for its leaders to ensure the vitality of Marist life and mission. The study revealed the essential elements for the formation of prophetic and collaborative global leaders who will be able to contribute in a significant way to guaranteeing the Marist presence and its evangelising educational mission among children and young people around the world. At the same time, the study presented strengths, challenges and opportunities that can contribute to the qualification of the processes and programmes of formation of Marist leadership.

The study can also serve as a reference for the formation of leaders from other religious institutes and congregations that are experiencing a similar context to that of the Institute of the Marist Brothers. For these institutions as well, the study becomes an important contribution to the formation of prophetic and collaborative global leaders capable of bringing vitality and ensuring the perpetuity of their charisms.

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APPENDIX A – PARTICIPANT INVITATION LETTER – INTERVIEW

Rome, 02 June 2021

Dear (Participant name),

Last year, I started a research study as a student of the PhD programme at St Mary's University, in Twickenham, London, England. The objective of the study, besides personal improvement, is to explore the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the Marist charism. The title of my research project is "Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities".

I believe that this study can be a great contribution to the formation of Marist leaders (Brothers and Laypeople) and their mission to ensure the continuity and vitality of the Marist charism. Since I know your commitment to Marist life and mission, I invite you to contribute to my research through a **face-to-face interview**.

Together with this letter, you will find a "Participant Information Sheet" with more information about the work and implications of your participation. You will also find a "Consent Form" which would be signed and returned to me if you agree to participate in the interview and contribute to the research study.

Thank you in advance for your availability and all that you do to ensure the future of the Marist charism.

Sincerely,

João Carlos do Prado
PhD Student

APPENDIX B – PARTICIPATION INFORMATION SHEET – INTERVIEW

Title of Research Project:

Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities.

This PhD dissertation research study is being completed at St Mary’s University, London, following the approval of the Ethics Sub-Committee. It focuses on the role and formation of leaders for the vitality and continuity of the Marist charism. The objective of this research is to explore the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the Marist charism.

A summary of the findings will be available to the General Government of the Marist Brothers as well as the participating Marist Administrative Units (Provinces and Districts). My hope is that the results will contribute to future planning and refinement of policies and programmes of formation on the Marist charism. A copy of the dissertation will be stored in St Mary’s University Open Research Archive (SORA).

As a member of the Institute, you have been invited to take part in this research project. If you agree to participate, you will be provided with this “Participation Information Sheet” and a “Consent Form” for signing. If you agree to take part in this research, the format of your participation will be through a face-to-face interview of approximately one-hour in duration. This interview, which will be recorded and transcribed, will take place at a conveniently agreed upon date, time, and location. All identifiable information provided will be made anonymous and remain strictly private and confidential and will be destroyed following the completion of the project.

I look forward to your participation in this project. If you have any questions, you can reach me, João Carlos do Prado, at 197110@live.stmarys.ac.uk or Dr. John Lydon, my dissertation supervisor at St. Mary’s University in Twickenham, London, at john.lydon@stmarys.ac.uk.

João Carlos do Prado

**YOU WILL BE GIVEN A COPY OF THIS INFORMATION SHEET TO KEEP
TOGETHER WITH A COPY OF YOUR CONSENT FORM**

APPENDIX C – CONSENT FORM – INTERVIEW

Name of the Participant:

Title of Project: **Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities.**

Name of Researcher: **João Carlos do Prado**

Contact: 197110@live.stmarys.ac.uk

1. I confirm that I have read the information sheet attached to this form for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.
2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason, without prejudice.
3. I agree that the interview will be recorded and the notes transcribed. All identifiable information provided will remain anonymous, safeguarded and remain strictly private and confidential and will be destroyed following the completion of the project.
4. I am free to ask any question at any time before and during the study.
5. I have been provided with a copy of this form and the participant information sheet.
6. I agree to take part in the above study.

Name of Participant	Date	Signature
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If you wish to withdraw from the research, please complete the form below and return to the researcher named above.

Title of Project: _____

I WISH TO WITHDRAW FROM THIS STUDY

Name of Participant	Date	Signature
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APPENDIX D – SEMI-STRUCTURED FACE-TO-FACE INTERVIEW QUESTIONS

1. Tell me your full name, age, nationality, total time of presence in the Institute and if you have previously studied in any Marist school.
2. Tell me a little about your formation and experience:
 - Academic background
 - Religious, spiritual and Marist formation
 - What you did before you became a member of the General Council
3. What are the elements that you consider having been essential in your formation as a Marist leader?
4. What do you think are the current strengths of the formation for Marist leaders?
5. What do you think are the current limitations of formation for Marist leaders?
6. What are the strengths and challenges of the formation processes to answer the calls of the 22nd General Chapter?
7. How should the General Council ensure the attraction and formation of leaders in the Institute for the vitality and continuity of the Marist charism?
8. How do you see the place and role of the laity in relation to Marist life and mission?
9. How do you see the place and mission of the Marist Brothers in the present context of the Marist charism?
10. Is there anything that we have not discussed regarding the role of leaders in maintaining the Marist charism that you would like to add?

APPENDIX E – AN EXAMPLE OF A TRANSCRIPT OF INTERVIEW

1. INFORMATION DATA

...¹⁵

2. FORMATION AND EXPERIENCE OF THE MISSION, AND ACADEMIC BACKGROUND

...

3. WHAT ARE THE ELEMENTS THAT YOU CONSIDER HAVE BEEN ESSENTIAL IN YOUR FORMATION AS A MARIST LEADER?

... So, any formation I had in leadership came from the experience of first of all, being a teacher in high school, then taking on roles within those schools. So, for example I had older Brothers who mentored me in various leadership roles. Things like being the coordinator for our year group. Then being a subject coordinator, eventually being Deputy Principal and then Principal of a school. So, I would say that all my leadership formation happened through the experience of learning to lead by practicing leadership and having older Brothers, not just Brothers, but older people work with me to help me learn how to be a leader.

... And once again, the Marist element of being a leader probably was through experiencing the leadership of other men who were Marists and developing an understanding from them about what it meant to be specifically a Marist Leader, what are the Marist values that are needed to make a good leader. That's basically how I learnt to be a leader.

4. WHAT ARE THE CURRENT STRENGTHS IN THE FORMATION OF MARIST LEADERS?

I'm not sure I have much experience in that (*laughs*). I didn't have much personal experience in forming leaders, well now that's not true. . . One of the current strengths that I've had something to do with in the last couple of weeks is there are Brothers and laypeople at the moment who are doing a lot of academic research around leadership and what it means to be a Marist leader. So, people. . . who have done a great deal of academic research in trying to understand what are the values that make a Marist leader, how to be a leader within a charism, those sorts of thing. So, I think that's one of the strengths at the moment, that there is a lot of material out there that explains that.

¹⁵ This indication throughout the interview indicates that the information contained in this section has been deleted to preserve participant identity.

The second thing I think we have a system in place at the moment where we do a lot of mentoring of young men and young women to become leaders. I think there is more and more. . . I think we understand the strength of mentoring young people into leadership, and helping them grow in leadership by providing them different responsibilities in their careers, but also having good mentors with them to talk with them, help them understand leadership.

The other thing I think that is developing at the moment is that many provinces have good programs, courses in leadership in helping to identify good leaders, helping to ensure that good young leaders, or good young people who are preparing for leadership, have access to good knowledge and good understanding of the charism, and many of these courses are short courses, they are short programs run by various province spirituality teams, leadership teams, education teams, those sorts of things. I think that's very good.

And this is very much in the developed world—if you want to call it like that—those experiences are very much in the developed world, and in other parts of the world. . . . So, I think that there's the academic work, there's the mentoring work, and then there's the work by provincial teams that provide good education and good experiences for people in leadership.

4 (B). AND AT THE GLOBAL LEVEL, HOW DO YOU SEE THAT?

At the global level? I think. . . do you just want the positives for the moment?

(YES)

OK—I think the work that the General Council does with provincials is important, particularly where there are more significant issues to be dealt with—I think that is a positive experience in developing leadership. I think it's a positive experience for leadership, and my experience of the provincials is that they want that accompaniment by the General Council. So, in a global thing, I think that's a very important part of what we do, probably the most important part of what we do is the accompaniment of provincials, particularly as various provinces and regions are dealing with some very difficult issues at the moment. I think that's important. There is the leadership guide that. . . the education evangelization team are working on at the moment. I think that will be an important document. That will codify in some way the reflection on leadership at the moment. . . I think they're important. How else? That's about it. That's the most important.

5. WHAT ARE THE LIMITATIONS OF A MARIST LEADERSHIP FORMATION?

For me, the biggest limitation is the inequality with which it happens at a provincial level. So in some cases, for example, we experience within one province, which has a number of countries, it can be a different experience. There can be countries

within a province that have really positive experiences of developing leadership – they have good mentors, they have good programs, they send their men and women away to get good training in leadership, but within the same province you’ll have another country where no one is training to be a leader. It seems unequal, there’s an inequality. . . So that’s I think a very strong concern that we try to have more equality in the processes to develop good leadership.

. . .the people being put into leadership are very young, they haven’t had the chance to experience the mentoring that I experienced as a young Brother, to have years where you develop your leadership skills through the lower levels of leadership, they are pushed very quickly into the school leadership, provincial leadership, all sorts of things. . . . And so I think that’s a big challenge for us at the moment, is how do we help those parts of the world where leadership formation doesn’t seem to be a priority? How do we help them to see it as a priority? So, I think that’s one thing.

I think the other thing is that you get particularly in those countries when you push people into leadership too early, and without sufficient formation and sufficient mentoring and sufficient support, the leadership becomes negative, has a negative impact. . . at the level of management, financial management, school management, provincial management, but also at the level of ensuring that the charism is being transmitted, you know? The young men and women being put into leadership really don’t have enough experiential understanding of the charism to value it in their own lives, so they don’t transmit it. So, you get schools that call themselves Marist schools, but when you go there, you wonder what the Marist element is there. Where there’s not enough formation for leadership, where there’s not enough mentoring, even short courses in leadership, there becomes a disconnect between the word Marist and what’s really happening in the schools. There’s a few around, not many, but there are a few around where that’s happening. So that’s a problem.

I think another issue that comes up in some parts of the world at a local level is the failure to appreciate the experience of laypeople. That it must be a Brother in leadership of the school, whereas our experience in some of those countries more and more, is proving that when laypeople move into the school, move into leadership, many of them have been through mentoring, so they tend to be older people, they tend to have had experience at the lower levels of leadership, they have learnt from their experience, so they tend to be better leaders. But we seem to be caught in a mindset in some parts of the world that it has to be a Marist brother who leads because it’s a Marist Brother school, and laypeople can’t lead it effectively. And yet in some of those countries, where through necessity they have to put a lay teacher in charge, it’s usually an older man who has more experience at earlier levels of leadership, at lower levels of leadership, who does a better job. And often their experience in Marist education means they understand Marist charism. I think that’s a challenge to ensure that we continue to appreciate and value what laypeople can bring to leadership, particularly in ministry. That’s a big challenge for people.

I think the other big challenge really in leadership is trying to cope with the various countries' regulations around our ministries, and then the tension that can bring with you know how some people feel that a Marist needs to lead a school. There are tensions between the government regulations and the Marist nature of a school. I think that happens more and more.

The other thing that I think is becoming more and more important in our schools, and I don't think we yet understand this, and it's happening very much more in the developing countries, is there is a growing commercialization of education. More and more businesses, particularly businesses from the developed world are moving into education in the developing world because you can make money out of it. And they tend to bring a great deal of innovation with them. . . . So, the schools in the developing world, the ministries, particular our school ministries in the developing world, are more and more working within a much more competitive environment because. . . you know. . . sustainability. We want to have middle-class schools because we can make money, we can sustain our provinces and our other ministries because we've got middle-class schools, but you've got many businesses now moving into and commercializing education, and they're offering a better product. So, we need to have schools that are more innovative, and so how does that impact on leadership? So, you want people to come into leadership who have an ability to innovate. And that's not always happening. Now I don't know where that fits on the Marist scale of things, but I think if we want to continue having an impact in education in the developing world, we have to work with our leaders to make sure that they're Marist leaders, that they bring the values of what it means to be Marist into their school, and they're also innovative. If they're not innovative, they won't have an impact on young people.

5 (B). FROM THE PERSPECTIVE OF THE GENERAL COUNCIL, HOW DO YOU SEE THESE LIMITATIONS IN THE FORMATION OF MARIST LEADERS? IN THE FORMATION TO HELP THEM KEEP ALIVE THE CHARISM.

I'll be honest with you—I really don't think we have a vision yet (*laughs*). I really don't think we know what our role is in this area. I don't think we have a vision of the future. We haven't worked out yet what we want our mission to look like in the future. We haven't yet started to cope with this whole idea of innovation, of what we need to do to work with poor young people, young kids, not just poor, but kids on the edge. We haven't articulated a vision yet. So, how can you develop. . . how can you articulate the formation of leaders? How can you really say this is the sort of leadership we want, and this is what we're going to do to get that leadership on a global level, without having articulated what our mission is? This is what we want you to lead. We haven't told them what we want them to lead yet. . . . It had nothing to do with Marist charism, what the Marist vision of education is, or anything like that. He was heading down this commercial model, and he just assumed that because we built the school, and it was our school, that it would become a Marist school full of Marist charism, but there was no articulation about how he was going to ensure that the school would be Marist. . . about what that

meant, and I think that's our role is to articulate that vision. To articulate, first of all, how are we going to move into the future? Providing appropriate education for young people on the peripheries. And how are we going to help form leaders to do that? I don't think we've even articulated the vision yet. So, I'm not sure how. . . I think we're missing something. Does that make sense to you? (*laughs*)

I think our most important role is to articulate a vision, and I'm not sure if what we're doing at the moment has articulated any vision. And therefore, I think some of our provinces and districts are left creating their own vision. And we spend a lot of time talking about sustainability, which is important—I have no problems with that, but if sustainability is the word that keeps on coming out of the General Administration, if that's the word that the provinces hear most, then that's what's going to motivate their mission in the provinces. They're going to be motivated by sustainability. So, the decisions they make at a provincial level, well they're going to say, how do we do how do we make this sustainable? Whereas if we were also. . . I have no problems with sustainability, I think it's important. But I really think the key messages coming from the General Administration should be different. I don't think sustainability should be the main message. It's important, it needs to happen, but the more important messages that need to come are: the charism of the institute moving into the future, the fact that the world of young people is changing radically, the fact that more people are on the periphery now in all sorts of ways, and we're not articulating that vision. So, we're not even ready yet to start talking about what sort of leaders we need (*laughs*). Sorry!

6. WHAT ARE THE STRENGTHS AND CHALLENGES OF THE FORMATION PROCESS AT ALL LEVELS TO RESPOND TO THE CALLS OF THE 22ND GENERAL CHAPTER?

I don't think we've taken the calls seriously. First of all, to me the greatest strength was we developed a new language, that provided us with a platform to create something new, something that was innovative, and something that had the potential to work with young people. To impact an impact on young people in new ways that we hadn't even thought of before. So, the language of the chapter was very powerful language. It was new language we'd never used before, it was creative language, and so we had the potential to develop a good platform, a good foundation to create something new in our impact on young people. So therefore, for me, the chapter itself was a positive experience in trying to do that, to create something new. I think the final message of the chapter had the potential of doing a lot of good, innovative work with young people, including in that the development of a good platform to create, to help form teachers for a future.

. . . I don't necessarily see as helping develop a vision from the General Chapter or helping to articulate and implement better the vision of the General Chapter. I think we've got caught up too much in ensuring that these projects have been finalized and we can put a tick in the box, rather than understanding how that helps build on the vision that was articulated at the General Chapter. So, the way I would put it is—the strategic plan has swamped the vision, so I think that's our biggest problem. That we were given a very

good document, a very good experience of the General Chapter to try and develop something new and innovative. I believe we moved too quickly into developing a strategic plan, and that strategic plan has swamped the vision of the General Chapter. I think we've become too inflexible with that. I think there needs to be. . . I think we're so caught in this strategic plan, and getting it finalized, so that at the end of the day we can say, yes—we developed the strategic plan and we did 80% of the projects—that the vision has got lost. Now I'm not sure if that's answered your question! (*laughs*). Does this help? (*laughs*)

7. HOW SHOULD THE GENERAL COUNCIL ENSURE THE ATTRACTION AND THE FORMATION OF LEADERS IN THE INSTITUTE FOR THE VITALITY AND THE CONTINUITY OF THE MARIST CHARISM?

The first thing I think we need to do is to broaden our. . . to broaden our understanding of where we're getting our leaders from. So, for example, in some provinces. . . and even for ourselves, I notice this in our own discussions. . . we immediately think that the job of leadership, oh it should be a Brother. And sometimes we need to broaden our understanding, broaden our pool, broaden our expectation of where we get our leaders from. And I think we need to understand better the fact that there is good leadership capacity and skills in the world, and how do we access that? We narrow it and limit it too much to a particular group. And as the number of Brothers is declining, that group of leadership of potential leaders is getting smaller. And as the men – because I'm talking about the Brothers here that we attract, particularly in parts of the world where we are attracting men now—, we're not attracting the best intellectual people, we're attracting far more people into our formation program of Brothers that are middle level people. . . or even a bit lower than middle level. Because in the developing world, the top level go into universities and get big jobs, and we're getting people who've. . . yeah, you know, got good background, but they're not the high flyers, so we need to attract high flyers. . . you know?

And so first of all, we need to change our mindset, change our paradigm of thinking where we're going to get our leadership from. We have to be prepared to import leadership at times, particularly for specific roles, and specific jobs, we need those skills. . . Can you repeat the question? I've forgotten it.

(REPEATS THE QUESTION. . .)

So, that's the first thing. We have to work on ourselves first. We have to broaden our understanding of where we can get leadership from, and be very clinical in that. . . like, we have this job, we need this leader, we need to go and get a person for that job who can do that job. Then we need to form that person in the Marist charism as part of his role for us. So, I think that's important. So therefore, we need to move into a more. . . we need to move the way we do things away from the French farmers (*laughs*). . . to understand that if we want to have an impact on the world, then we need to attract the best people to do that job. So therefore, we're going to have to change our way of looking

at finances, we're going to have to change our way of looking at roles. . . all those sorts of things. . . you know? So, I think that's part of it.

The other thing we have to do. . . no, the other thing I think would be helpful, particularly for all young Marists, whether Brothers or Lay, we need to make sure we start to identify people with potential earlier, and give them good formation before they move into leadership.

The other thing I think will be helpful is to change our attitude about leadership. Like we have this attitude at the moment that like "I'm a poor humble Marist Brother, and I move into leadership because the Brothers have voted for me, but I'm really a poor humble Marist Brother". Hidden and unknown and all that sort of stuff. . . whereas I think we need to become a little bit, no it's alright to want to be a leader, you know? You lose some people because they do want to be leaders, you know? They have ambition and we kind of frown on ambition, at times. Yes, I think we frown on ambition. I think it's good, some ambition is good, and if you want to attract good leadership, then there has to be a path for them to develop as leaders, there has to be a path for them where their ambition is accepted, and encouraged, rather than hidden. . . (*laughs*). . . it's not good for a Brother to be ambitious almost, it's not good for a Marist to be ambitious. . . but I think ambition can be a good thing. . . and to be a good leader.

So, I think we lose people who could be good leaders because we don't allow them. . . . I think another way is to. . . as much as possible, broaden our formation of younger people. . . broaden the number of younger people who are involved in our formation. . . not as Brothers, but as Marists. . . and who are attracted to Marists and put more energy into them, for example—what Gerard told us yesterday—he's lost three good young people. . . and he really has no-one to fulfill those leadership roles now. . . he's lost them, so if there was a broader group, there might be someone who could move into that. . . . So, to broaden the formation. . . probably even in our schools. . . yes, to have more formation about what it means to be a Marist, about what it means to be. . . living the charism through the whole of your life, those sorts of things. I think this would attract people who might not want to be Brothers, but who have the capacity to be leaders in the future. That was a hard question that one! (*laughs*).

8. HOW DO YOU SEE THE PLACE AND THE ROLE OF THE LAITY IN RELATION TO MARIST LIFE AND THE MISSION?

I think it's central, as the number of Brothers decline, and even in those areas where we're getting more vocations, perseverance is not at such a high-level. So, we're not really getting a lot of sustained vocation in those careers. And therefore, I think having laypeople, if we really believe in the Marist charism—the charism of Marcellin Champagnat—is vital for the world, and because it is a gift of the Holy Spirit, I think we do believe it's vital for the world. That I think that laypeople become central to that. So, you know, I think one of the things we need to do is just. . . the general. . . can you repeat the question please? I got a bit lost. . .

(REPEATS THE QUESTION. . .)

I think laypeople need to become more and more involved in the leadership structures that we have at the General Administration. I think the day of having secretariats and having directors of secretariats who are Brothers predominantly is quickly coming to an end. For us to have, in this house we have. . . one, two, three secretariats?. . . So, in a diminishing number of Brothers, that's important to realize. . . that we do end up. . . and as you're aware, sitting on the General Council like myself. . . it's very difficult to get people to come into these roles. There is a diminishing pool of Brothers for these roles. . . so I think the laypeople. . . and how to provide opportunities and the environment for laypeople to be involved in the General Administration into the future is very important. . . .

So, at the moment, I think it's central to our future. I think laypeople is central to our future, both mission and Marist life. I don't think we're even thinking about how to provide the correct incentive, the correct environment, the correct structures for them to be able to do that. So, I think that's important, particularly with Marist life. I think the laypeople in Marist life, I think we need to take more seriously the formation of ALL Marist Brothers and laypeople. I think we need to structure processes that allow laypeople to be formed as Marists, that also take seriously their life as laypeople. So, it's a different way of doing it. So, for example—the Jesuits have a 30-day retreat, but they also have the 30-day retreat in normal life, where it's a process of reflecting during your normal life. It's for people who live a normal life, who can't afford to go away and spend 30 days quietly on a mountain praying, you know? So therefore, what have WE done to do that? To formulate people in their normal life. . . lay formation in their normal life, where it doesn't involve going to another country for four weeks, or three weeks, or two weeks. . . where they can do the formation and take the formation seriously while still being a mother of young children, while still being a husband of a family, who has a job in a school and can't afford to come away for three weeks. We need to take that more seriously.

So, I think the formation is important there and I think laypeople in the future will take Marist life into places we never even thought about. Remember the young people at the General Chapter—now they were saying things to us about young people with sexual identity issues, about young people in poverty, about young people on the peripheries, saying these people need to experience Marists, you know? And I think it's laypeople who will be the ones who will have the initiative and the get up and go to go into those places where young people need assistance, where the Marist presence will have a positive impact. So I think they're central to our mission, I think they're central to the innovation of our mission, I think they're central to our life, to what it means to be Marist, I think we need to find new ways of forming Marists, that take into account their lay life, I think we need to find structures that enable Marists, Lay Marists to participate more and more in leadership. leadership of mission, leadership of the institute, you know? That's the challenge for the future. And unless we meet that challenge, I think we'll have a very diminished future. Did I answer that question? (*laughs*)

9. HOW DO YOU SEE THE PLACE AND THE MISSION OF THE BROTHERS IN THE NEW CONTEXT OF THE MARIST CHARISM?

Well, my hope. . . do remember Olga? Remember Homes of Light? So, I would like to see Brothers as being lynch pins, focal points where laypeople can connect for community, right? So, I think what the Brothers bring that is different, is community. Our desire for community and communion. I think in terms of our Marist life, I think we offer the possibility to help laypeople open up to a new experience with community. I think that's one of our gifts, that we bring something different to them. Like laypeople do with their married life, or their life as. . . whatever their life is—they bring that gift, and we bring the gift of living in communion and living in community. And so, I think for Brothers, one of the challenges for the future. . . no wait, it's not a challenge, it's one of the things we have to offer, is the desire to live in community and to live in communion and to hopefully into the future. . . the Brothers can become center points, or focal points where community can develop around them. They don't have to run the community, but just to be an inviting presence for communion. And to be open to the fact that if you're an inviting presence, that you're going to get all sorts of people who want to be part of that communion. They're not going to fit in nice little boxes. They're not all going to view being Marist as the same way I view being Marist. They're going to bring alternative opinions, so we offer also a chance where people can come and be listened to, you know? And to bring their opinions, their ideas, their spirituality – that's important. So, I think that's an important thing that we can offer.

Within mission, my hope is that we can bring—and I think we do lack this—we bring the sense of encouraging people to start moving the limitations in our mission, you know? To extend the structures, extend what we do so that we find new ways of working with young people on the periphery. So, we encourage people to go to the periphery, we can be an encouraging presence, and some of our younger Brothers hopefully can be a leading presence in that. To take laypeople with them when they go to the peripheries. I think the Brothers have two really important focal points, or roles there: one is the encouraging, supporting, and the other one at times is to lead people to the peripheries. And almost to lead, set up and then to let be with the laypeople. . . to let that develop, and then move to the next periphery, you know? Innovation. We have the freedom to be innovative. The freedom to do things differently and new. And the freedom to encourage laypeople. And the freedom to support laypeople as they try new things. So, I think there's two elements there: supporting and encouraging, and also to lead into new areas. So, I think they're the two things—we have that to offer.

And I think the challenge therefore—within the Brothers—is a new paradigm, a new understanding of our role, a new understanding of where the Spirit is calling us to be. I think there is an important role for the Brothers, but I think it doesn't need as many Brothers as we used to need in the past. So I don't see the diminishing number of Brothers. . . I see it as a call of the Spirit. A positive call of the Spirit to say—yes, I want Brothers, and this is what I want you to do. So, I don't need so many of you anymore (*laughs*), you know? I want you to be supporting and encouraging, and I want you to be innovative in mission. And I want you to be central to communion. So, in terms of Marist life, I want you to be central to communion; to be open and welcoming and listening to people. To

have communion—not revolve around you, not lead it – but to provide a kind of focal point for it, a stability for it, an understanding of it that other people don't necessarily have, an experience of it. And the other one is to be encouraging in supporting a mission, and to lead mission into new areas, so maybe the Spirit has plenty of people to do the Spirit's work, but maybe the Brothers need to just focus on what our role is (*laughs*).

10. ANY OTHER COMMENTS REGARDING THE ROLE OF LEADERS IN MAINTAINING THE MARIST CHARISM?

No, I think I'm happy with what I've said. . . . for me, the most significant thing I said is the need for the central leadership group, the global central leadership group is to develop a well-articulated vision. It comes out of the General Council, out of the General Chapter, but I think the need for the General Administration, or the General Council, to be able to articulate that is very important. And it's only once we've articulated that—and that is the real role of leadership at this level—is to articulate that. Then we can start looking for how we form leaders to fulfill that vision. How do we develop plans to fulfill that vision? And once we've done that, we can start looking at what sort of leaders we do.

The other thing I think in terms of leadership, I think the Brothers continue to have a very important role, a significant role, but I think that role needs to work from a new paradigm now, and I think we haven't got there yet, we haven't understand our role moving into the future, you know? And I think therefore us as leaders have to continue trying to articulate that vision—first of all—and that new paradigm we're coming out of. I see them as slightly different, but very related. So, I think that's an important thing. And then we can say, and these are the leaders we need to do this, you know? And I think this General Council we have maybe missed the boat on that. I think we're doing many good things, but I don't think we're doing the thing we should be doing as well as we should be doing it, you know?

APPENDIX F – FACE-TO-FACE SEMI-STRUCTURED INTERVIEWS THEMATIC ANALYSIS USING NVIVO

Questions 1 and 2:

1. Tell me your full name, age, nationality, total time of presence in the Institute and if you have previously studied in any Marist school.

2. Tell me a little about your formation and experience:

a) Academic background.

b) Religious, spiritual and Marist formation.

c) What you did before you became a member of the General Council.

Note: These two questions were related to general information about the participants.

Therefore, it was not necessary to use the NVivo data analyser. The graphics in Chapter 7 were prepared by the researcher from the information obtained from each participant.

Nodes\Interviews\Question 3: **What are the elements that you consider having been essential in your formation as a Marist leader?**

Name	Description	Files	References
Leadership Formation	Training programmes to develop the potential of leaders, with the aim of leveraging the management of resources, people, and the generation of results for an organisation.	7	7
○ <i>Marist Charism Formation</i>		1	1
○ <i>The gospel of Jesus Christ</i>		1	2
○ <i>Exchange of Leadership Experiences</i>		2	2
Leadership Practice	The way in which a leader leads and manages people effectively, which requires a lot of emotional control, self-confidence, vision of the future, strategic planning, among many other fundamental skills.	6	6
○ <i>Working with Marist Youth Ministry groups</i>		4	4
Leadership Mentoring	Mentoring is the support of new leaders to increase their leadership capacity. It is aimed at leaders at all levels, newly promoted professionals or those who want to increase their chances of taking over a	2	2

Name	Description	Files	References
	team in the future.		
○ <i>Trust</i>		1	1
Leadership Personality Development	Developing the skills of a leader for their human relations and to face the contexts of their action.	2	2
Example of Previous Leaders	Current or past leaders who serve as inspiration for the exercise of leadership.	2	2
○ <i>Marist Charism</i>		1	2

Nodes\Interviews\Question 4: **What do you think are the current strengths of the formation for Marist leaders?**

Name	Description	Files	References
Decentralized Formation Programmes	To enable the implementation of training programmes at various levels and in various institutional areas.	6	6
Building a vision of the charism	To assure all leaders a clear vision of the Marist charism.	5	5
Greater Formation of the Leaders	Ensure that the formation of the leaders can be systematic and in-depth.	5	5
Accompaniment of the General Government	Proximity of the General Government to ensure the delivery and quality of formative programmes.	4	4
Accompaniment of the New leaders	Strategies and processes that enhance new leaders' personal development and leadership skills.	4	4
The New Understanding of Leadership	Incorporating new perspectives and understanding of leadership for the contemporary world.	3	4
Sharing Best Leadership Practices	Share projects, initiatives and leadership experiences that can contribute to the development and practice of other leaders.	2	2

Nodes\Interviews\Question 5: **What do you think are the current limitations of formation for Marist leaders?**

Name	Description	Files	References
The Lack of a Leadership Development Plan	The lack of training programmes to develop the potential of leaders, with the aim of leveraging the management of resources, people, and the generation of results for an organisation.	7	7

Name	Description	Files	References
Building Leadership Capacity	Leadership capacity constitutes in the formation of leadership structures highly prepared to define the directions of a team and its communication to people, motivating them, inspiring them and enabling them to contribute to the effort towards organisational success.	6	6
The Quality of Leadership Formation Programmes	Leadership training programmes with quality impact on the lives of leaders, teams and organisations.	5	5
Weak Leadership Accompaniment	Deficiency in the training and development of leadership positions.	4	4
Difficulty to Change Mindset	Resistance and letting go of old paradigms and welcoming new ones.	4	4
Co-responsibility Among Brothers and Laypeople	Recognition that Brothers and Lay Marists have the same responsibility for the Marist charism.	3	3
Availability of Human and Economic Resources	Resources available for leadership formation programmes.	2	3

Nodes\Interviews\Question 6: **What are the strengths and challenges of the formation processes to answer the calls of the 22nd Marist General Chapter?**

Name	Description	Files	References
Strengths	The capacity of formation programmes to promote the calls of the 22nd Marist General Chapter	0	0
○ <i>Formation of the Leaders</i>		5	5
○ <i>Strategic vision and Direction</i>		3	3
○ <i>Understanding of “Global Family” concept</i>		3	3
○ <i>Development of a New language</i>		1	1
Challenges	Obstacles to be overcome so that the formation programmes may promote the calls of the 22nd Marist General Chapter.	0	0
○ <i>Putting the 22nd General Chapter Calls in Practice</i>		5	5

Name	Description	Files	References
○ <i>Promoting Formation Programmes</i>		3	4
○ <i>Lack of Resources</i>		3	3

Nodes\\Interviews\\Question 7: **How should the General Council ensure the attraction and formation of leaders in the Institute for the vitality and continuity of the Marist charism?**

Name	Description	Files	References
Attraction of Leaders	The attraction and selection process that seeks to attract and bring together professionals interested in becoming Marist leaders.	4	6
○ <i>Supporting Local Leaders</i>		7	7
○ <i>Sharing vision</i>		2	2
Formation of Leaders	Training programmes to develop the potential of leaders, with the aim of leveraging the management of resources, people, and the generation of results for an organisation.	4	8
○ <i>Promoting Leadership Formation Programmes</i>		6	6
○ <i>Offering Leadership Formation Guidelines</i>		3	3
○ <i>Accompanying Leadership Formation Processes</i>		2	2
○ <i>Raising Awareness of the Need for Leadership Formation</i>		1	1

Nodes\Interviews\Question 8: **How do you see the place and role of the laity in relation to Marist life and mission?**

Name	Description	Files	References
Place of the laity in relation to Marist life and mission	Participation of lay Marists in the charism.	0	0
○ <i>They are Central to the Charism</i>		8	8
○ <i>Sharing Marist Life and Mission</i>		7	7
○ <i>Leadership Positions</i>		6	6
Role of the laity in relation to Marist life and mission	Responsibilities of the laity in Marist life and mission.	0	0
○ <i>Co-responsibility in the Life and Mission</i>		6	6
○ <i>Marist Leadership</i>		4	4

Nodes\Interviews\Question 9: **How do you see the place and mission of the Marist Brothers in the present context of the Marist charism?**

Name	Description	Files	References
Place	Participation of the Marist Brothers in the charism.	0	0
○ <i>Charismatic Presence in the Life and Mission</i>		6	6
○ <i>Together with the Marist Laity</i>		2	2
○ <i>International Availability</i>		1	1
Mission	New presence and responsibilities of the Marist Brothers in Marist life and mission.	0	0
○ <i>Co-responsibility for Life and Mission</i>		8	8
○ <i>Experts in Fraternity</i>		5	5
○ <i>Among Children and</i>		2	2

Name	Description	Files	References
<i>Young People</i>			
○ <i>Formation of Marist Leaders</i>		2	2

Nodes\Interviews\Question 10: **Is there anything that we have not discussed regarding the role of leaders in maintaining the Marist charism that you would like to add?**

Name	Description	Files	References
Better Definition of the Role of the General Council	To clarify the mission, responsibilities, competencies and attributions of the General Council in relation to the Institute of the Marist Brothers.	4	4
Formation of Marist Leaders for this time	Offering an updated training programmes to develop the potential of leaders, with the aim of leveraging the management of resources, people, and the generation of results for an organisation.	4	4

APPENDIX G – PARTICIPANT INVITATION LETTER – QUESTIONNAIRE

Rome, 2nd June 2021

Dear (Participant name),

The reason for this communication is to invite you to participate in a research project that I am developing as part of my doctoral studies.

Last year, with the support of Brother Ernesto Sanchez, I began a PhD programmes of studies in Catholic School Leadership at St. Mary's University in Twickenham, London, England. I am writing to you in my capacity as a student member of St. Mary's Faculty of Education, Humanities and Social Sciences (EHSS). My research is focused on the role and formation of leaders for the vitality and continuity of the Marist charism. The objective of this research is to explore the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the Marist charism. I hope that the study will serve as a contribution to our formation programmes on the Marist charism.

I believe your wide experience of leadership in Marist life and mission is tangible and can offer valuable insights in the formation of future Marist leaders. I would like to count on your participation in this significant research. It would be a great privilege for me to be able to count on your contribution.

Your participation would consist of answering a questionnaire through an online survey tool. Information about your participation can be found in the other three documents attached to this e-mail. These are the "Invitation Letter", a "Participation Information Sheet" and a "Consent Form". If you agree to participate in the research by completing the online survey, I ask that you complete the "Consent Form" as outlined and send it to me as explained in the attached documents.

Thank you for your consideration.

Sincerely,

Br. João Carlos do Prado
PhD Student
197110@live.stmarys.ac.uk

APPENDIX H – PARTICIPATION INFORMATION SHEET – QUESTIONNAIRE

Title of Research Project:

Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities.

This PhD dissertation research study is being completed at St Mary's University, London, following the approval of the Ethic Sub-committee. It will focus on the role and formation of leaders for the vitality and continuity of the Marist charism. The objective of this research is to explore the essential elements necessary for the formation of prophetic and collaborative global leaders, who can contribute to the vitality and continuity of the Marist charism.

A summary of the findings will be available to the General Government of the Marist Brothers as well as the participating Marist Administrative Units (Provinces and Districts). It is hoped that the results will contribute to future planning and refinement of policies and programmes of formation on the Marist charism. A copy of the dissertation will be stored in St Mary's University Open Research Archive (SORA).

As a member of the Institute, you have been invited to take part in this research project. If you agree to participate, you will be provided with this "Participation Information Sheet" and a "Consent Form" for signing. If you agree, your participation will be in the form of answering a questionnaire, via an on-line survey tool, which will take approximately 30 minutes to complete. The link to access the questionnaire will be sent to you by email. Once you receive the email, you will have seven (7) days to answer the questionnaire. All identifiable information provided will be anonymous and remain strictly private and confidential and will be destroyed following the completion of the project.

I look forward to your participation in this project. If you have any questions, you can reach me, João Carlos do Prado, at 197110@live.stmarys.ac.uk or Dr. John Lydon, my dissertation supervisor at St. Mary's University in Twickenham, London, at john.lydon@stmarys.ac.uk.

**YOU WILL BE GIVEN A COPY OF THIS INFORMATION SHEET TO KEEP
WITH A COPY OF YOUR CONSENT FORM**

APPENDIX I – CONSENT FORM – QUESTIONNAIRE

Title of Project: **Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: Challenges and Opportunities**

Name of Researcher: **João Carlos do Prado**

Contact: 197110@live.stmarys.ac.uk

1. I confirm that I have read the information sheet attached to this form for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.
2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason, without prejudice.
3. I agree that the questionnaire will be answered using an online survey tool. All identifiable information provided will remain anonymous, safeguarded and remain strictly private and confidential and will be destroyed following the completion of the project.
4. I am free to ask any question at any time before and during the study.
5. I have been provided with a copy of this form and the participant information sheet.
6. I agree to take part in the above study.

_____	_____	_____
Name of Participant	Date	Signature

If you wish to withdraw from the research, please complete the form below and return to the main investigator named above.

Title of Project:

I WISH TO WITHDRAW FROM THIS STUDY

_____	_____	_____
Name of Participant	Date	Signature

APPENDIX J – QUESTIONNAIRE QUESTIONS

1. Identification data:

Marist Brother Lay Person

- a. Age: _____
- b. Gender: male female
- c. Nationality: _____
- d. Academic background: _____
- e. Religious, spiritual and Marist formation: _____
- f. Current role: _____
- g. Time you have been in the Institution: _____
- h. Did you study in a Marist School? yes no

2. Considering your Marist experience and on a scale where 4 represents “strongly agree” and 1 represents “strongly disagree”, how would you rate each of the following statements?

- 4 strongly agree
- 3 agree
- 2 disagree
- 1 strongly disagree

1.1 *There are sufficient programmes of attraction and Formation of leaders on the Marist charism at all levels of the Institute of the Marist Brothers.*

4 3 2 1

1.2 *The current Formation Programmes guarantee a deep knowledge of the Marist charism.*

4 3 2 1

1.3 *The impact of Marcellin Champagnat is well known to all engaged in the Marist Mission.*

4 3 2 1

1.4 *All lay Marists have a deep knowledge of the Marist charism.*

4 3 2 1

1.5 *The current programmes and formation processes are helping to create a vision of vitality and continuity for the future of the Marist charism.*

4 3 2 1

1.6 *The current formation processes respond perfectly to the current needs of Brothers and lay Marists in ensuring the vitality and continuity of the Marist charism.*

4 3 2 1

1.7 The Marist charism is very well known among all the collaborators of the Marist mission.

4 () 3() 2() 1()

1.8 The current General Council of the Institute of the Marist Brothers is committed to collaborative leadership

4 () 3() 2() 1()

1.9 There is a high level of co-responsibility of Brothers and laypeople in Marist life (spirituality, community life, charismatic formation. . .).

4 () 3() 2() 1()

1.10 There is a high level of co-responsibility of Brothers and laity in the Marist mission (evangelization and education of children and young people).

4 () 3() 2() 1()

2. What do you understand by “prophetic and collaborative global leadership”?
3. Could you suggest what are the crucial strengths of the formation of the Marist leaders (Brothers and laypeople) today to ensure the vitality and continuity of the Marist charism?
4. Could you suggest what are the challenges of the formation of the Marist leaders (Brothers and laypeople) today to ensure the vitality and continuity of the Marist charism?
5. Could you suggest what are the key elements that should guide the formation of the Marist leaders (Brothers and laypeople) in the future to ensure the vitality and continuity?

APPENDIX K – ONLINE SURVEY QUESTIONNAIRE THEMATIC ANALYSIS USING NVIVO – QUALITATIVE QUESTIONS: 20, 21, 22 AND 23

Nodes\Question 20 Prophetic and Collaborative Global Marist leadership (understanding)

Name	Description	Files	References
Collaborative Leadership	Collaborative leadership, as the name itself says, refers to the action of collaborating, of working together, of an attitude of working together towards a common goal. This type of leadership can be exemplified in teamwork, networking, in the capacity of dialogue and listening. Particularly in relation to the Marist charism, it could be said that it is the co-responsibility of Brothers and lay Marists for the Marist charism.	0	0
○ Co-responsibility		8	8
• <i>Empowering of leaders</i>		7	8
• <i>Delegation of authority</i>		3	3
○ Cooperation		7	7
• <i>Inclusive</i>		11	11
• <i>Networking</i>		9	12
• <i>Work as a team</i>		6	6
○ Communion		3	3
○ Listening and Dialogue		9	10
Global Leadership	In the context of this case study, the term <i>global</i> refers to Marist leaders acting on a global level. In this case, they are the members of the General Council of the Institute of the Marist Brothers. In addition, it refers to the profile of Marist leadership with a heart and mind without boundaries. Open mind. Able to overcome ideological, cultural and social barriers for the good of all.	1	1
○ Transcending borders		7	7
○ Committed to the Charism		2	2
○ Global vision		11	11
○ In tune with the world		7	7
Prophetic Leadership	A leadership that takes risks, inspired by the gospel, with coherence of life, with an open	0	0

Name	Description	Files	References
	vision, sensitive to the needs of the most vulnerable, flexible, focused on the future and on the lives of people and the planet. A leader who understands his/her mission as service and not as power. Authority by his/her consistent life witness, discernment of the signs of the times and vision of future.		
○ Charismatic		1	1
• <i>Authority</i>		3	3
• <i>Inspiring</i>		2	3
○ Guided by the Gospel		5	6
• <i>Attitudes</i>		4	4
• <i>Authentic</i>		5	6
• <i>Spirituality</i>		5	5
• <i>Defend life</i>		5	5
○ Servant		8	8
○ Transformative		7	8
• <i>Cares for</i>		4	5
• <i>Creative</i>		6	6
• <i>Audacious</i>		6	6
○ Signs of the times		8	11

Ame	Description	Files	References
Collaborative Leadership	Collaborative leadership, as the name itself says, refers to the action of collaborating, of working together, of an attitude of working together towards a common goal. This type of leadership can be exemplified in teamwork, networking, in the capacity of dialogue and listening. Particularly in relation to the Marist charism, it could be said that it is the co-responsibility of Brothers and lay Marists for the Marist charism.	0	0
○ Co-responsibility		8	8
• <i>Empowering of leaders</i>		7	8
• <i>Delegation of authority</i>		3	3
○ Cooperation		7	7
• <i>Inclusive</i>		11	11
• <i>Networking</i>		9	12

Ame	Description	Files	References
<ul style="list-style-type: none"> • <i>Work as a team</i> 		6	6
○ <i>Communion</i>		3	3
○ <i>Listening and Dialogue</i>		9	10
Global Leadership	In the context of this case study, the term <i>global</i> refers to Marist leaders acting on a global level. In this case, they are the members of the General Council of the Institute of the Marist Brothers. In addition, it refers to the profile of Marist leadership with a heart and mind without boundaries. Open mind. Able to overcome ideological, cultural and social barriers for the good of all.	1	1
○ <i>Transcending borders</i>		7	7
○ <i>Committed to the Charism</i>		2	2
○ <i>Global vision</i>		11	11
○ <i>In tune with the world</i>		7	7
Prophetic Leadership	A leadership that takes risks, inspired by the gospel, with coherence of life, with an open vision, sensitive to the needs of the most vulnerable, flexible, focused on the future and on the lives of people and the planet. A leader who understands his/her mission as service and not as power. Authority by his/her consistent life witness, discernment of the signs of the times and vision of future.	0	0
○ <i>Charismatic</i>		1	1
<ul style="list-style-type: none"> • <i>Authority</i> 		3	3
<ul style="list-style-type: none"> • <i>Inspiring</i> 		2	3
○ <i>Guided by the Gospel</i>		5	6
<ul style="list-style-type: none"> • <i>Attitudes</i> 		4	4
<ul style="list-style-type: none"> • <i>Authentic</i> 		5	6
<ul style="list-style-type: none"> • <i>Spirituality</i> 		5	5
<ul style="list-style-type: none"> • <i>Defend life</i> 		5	5
○ <i>Servant</i>		8	8
○ <i>Transformative</i>		7	8
<ul style="list-style-type: none"> • <i>Cares for</i> 		4	5
<ul style="list-style-type: none"> • <i>Creative</i> 		6	6
<ul style="list-style-type: none"> • <i>Audacious</i> 		6	6
○ <i>Signs of the times</i>		8	11

Nodes\\Question 21 **Strengths in the formation of the Marist Leaders**

Name	Description	Files	References
Emphasis on Marist Identity formation	Formation offered to Marist leaders with a focus on the charismatic elements of the institution: identity, spirituality, mission, principles, pedagogy, history, Founder Father Marcellin Champagnat, first Marist Brothers, expansion and presence in the world.	50	50
○ <i>Care of the Marist Vocation</i>		11	11
○ <i>Marist Charismatic formation</i>		26	26
○ <i>Co-responsibility</i>		14	14
Good Quality of the Formation programmes	The systematization of leadership training proposals in a concrete, intentional and organic way with clear and defined objectives, processes, phases, results and follow-up.	37	37
○ <i>Methodology</i>		24	24
○ <i>Exchange of experiences</i>		9	9
○ <i>Holistic development</i>		4	4
Leadership skills development	Initiatives undertaken to develop the leadership capacities of Marist leaders through training programmes, seminars, workshops, personal accompaniment, etc.	29	29
Institutional support	All the institutional efforts made to ensure the training of leaders such as the articulation of the different levels of governance of the Institute, mobilization of resources, definition of strategies, structural support and facilitation of mutual knowledge among leaders.	24	24
○ <i>Structures</i>		12	12
○ <i>Resources Availability</i>		11	11
Formation in the Marist Mission	The Marist mission to make Jesus Christ known and loved among children and young people through education. This mission is based on love as a condition for education. Its main principles are pedagogy of presence, love of work, simplicity, family spirit and the way of Mary.	20	20

Nodes\\Question 22 **Challenges in the formation of the Marist Leaders**

Name	Description	Files	References
Strengthening Co-responsibility for the Marist Charism	To create conditions, spaces and structures that favour a change in mentality and openness to participation and the full exercise of the co-responsibility of lay Marists in every possible aspect of Marist life and mission. Co-responsibility also implies greater inclusion of women in leadership positions and a more horizontal model in the leadership and government of the Institute of Marist Brothers.	55	56
Strengthening Leadership Formation Programmes	To rethink in an organic, systematic and professional way the formation programs developed by the Institute of Marist Brothers, at all levels, seeking to update them to the new contexts of society, the Church, and the Institute; offering greater quality and process; guaranteeing legal recognition, when possible; contemplating the realities where there is more lack of formation or no formation process in progress; and guaranteeing continuous and permanent formation of leaders.	34	34
○ <i>Lack of Formation Programmes</i>		9	9
○ <i>Quality of the Formation Programmes developed</i>		4	4
Implementation of a Leadership Formation Management Programme	Clear, shared and professional process of accompaniment of the whole life of Marist leaders' cycle in the institution: entrance, permanence and conclusion of its mission. It aims to ensure at the level of the leaders as well as of the institution a healthy and solid process for the preparation of competent people committed to the vitality and continuity of Marist life and mission.	31	31
○ <i>Accompaniment of Leadership</i>		31	31
○ <i>Clarification of the Profile of Marist Leadership</i>		30	30
○ <i>Prepare New Leaders</i>		10	10
Care of the Marist vocations	To strengthen the care given to promote, discern, form and accompany new Marist vocations of Brothers and laity as well as to nurture existing vocations.	31	31
Offer Greater Institutional Support	Clear guidelines on training processes for current Marist leaders as well as the preparation of new leaders. These guidelines should be very clear regarding all aspects related to the Marist charism, its mission, management, skills, organizational culture, abilities, competencies, supervision, attitudes,	28	25

Name	Description	Files	References
	behaviours, etc. In addition, what are the institution's requirements and support for the continued updating of Marist leaders.		
○ <i>Allocation of Resources Needed for Formation</i>		19	17
○ <i>Definition of Institutional Formation Policies</i>		8	8
Strengthening Formation in the Marist Mission	To ensure that all Marist leaders have a common and shared vision of the Marist mission to make Jesus Christ known and loved among children and young people, especially the poor, through education. At the same time, a common reading of the contexts and challenges of the contemporary world as well as a macro vision of the reality of the Marist Institute today.	12	11
○ <i>Building a Common Vision of the Marist Mission</i>		9	8

Nodes\Question 23 Key elements of Marist Leaders' formation

Name	Description	Files	References
Promoting Greater knowledge of the Marist charism	Critical, deep and contemporary knowledge of life (fraternity), mission, spirituality which constitute the intrinsic elements of the Marist charism. To offer the opportunity to deepen the life of Marcellin Champagnat and the first Brothers and the elements of their vision and experience that have impacted the Marist charism. To deepen the tradition, history, and Marist expansion in the world. To know the current context of the Marist world and how the charism is embodied today.	50	50
○ <i>Creating a Broad Vision of the Marist Life and Mission</i>		22	22
Promoting Co-responsibility Between Brothers and Lay Marists	To create conditions, spaces and structures that favour a change in mentality and openness to participation and the full exercise of the co-responsibility of lay Marists in every possible aspect of Marist life and mission. Co-responsibility also implies greater inclusion of women in leadership positions and a more horizontal model in the leadership and government of the Institute of Marist Brothers.	44	44
○ <i>Empowering Laypeople</i>		11	11
○ <i>Promoting Experiences</i>		10	10

Name	Description	Files	References
<i>of Marist Community Life</i>			
Offering a Personalized Development Process	To encourage all Marist leaders, Brothers and Lay Marists, a path of growth, maturation and accompaniment in the development of their leadership and all its human, Christian, Marist and professional dimensions.	38	38
○ <i>Helping in the Development of Interiority and Spirituality</i>		17	17
○ <i>Contributing to Self-awareness Processes</i>		6	5
Ensuring the Development of Leadership skills	Opportunities for Marist leaders to develop their personal and professional skills for the development of the mission entrusted to them.	32	32
○ <i>Better Defining the Profile of the Marist Leaders</i>		13	13
Strengthening Formation Processes	To ensure inclusive, recognized, updated, ongoing, and quality formation processes for all Marist leaders, Brothers and laity, at all levels and realities of the Marist world.	29	29
○ <i>Strengthening the Formation Programmes of Marist Leaders</i>		19	19
○ <i>Articulating Theory and Practice</i>		12	13
○ <i>Responding to Emerging Themes</i>		9	10
○ <i>Ensuring the Allocation of Necessary Resources</i>		2	2
Preparing New Leaders	Attracting or identifying new leaders who are completely aligned with the Marist charism and who can initiate formation processes in view of their future leadership and commitment in Marist life and mission.	5	5

APPENDIX L – ETHICS SUB-COMMITTEE APPLICATION FOR RESEARCH ETHICAL APPROVAL



St Mary's University Ethics Sub-Committee Application for Ethical Approval (Research)

This form must be completed by any undergraduate or postgraduate student, or member of staff at St Mary's University, who is undertaking research involving contact with, or observation of, human participants.

Undergraduate and postgraduate students should have the form signed by their supervisor, and forwarded to the Faculty Ethics Sub-Committee representative. Staff applications should be forwarded directly to the Faculty Ethics Sub-Committee representative. All supporting documents should be merged into one document (in order of the checklist) and named in the following format: **'Full Name – Faculty – Supervisor'**

Please note that for all undergraduate research projects the supervisor is considered to be the Principal Investigator for the study.

If the proposal has been submitted for approval to an external, properly constituted ethics committee (e.g. NHS Ethics), then please submit a copy of the application and approval letter to the Secretary of the Ethics Sub-Committee. Please note that you will also be required to complete the St Mary's Application for Ethical Approval.

Before completing this form:

- Please refer to the **University's Ethical Guidelines**. As the researcher/ supervisor, you are responsible for exercising appropriate professional judgment in this review.
- Please refer to the Ethical Application System (Three Tiers) information sheet.
- Please refer to the Frequently Asked Questions (FAQs) and Commonly Made Mistakes sheet.
- If you are conducting research with children or young people, please ensure that you read the **Guidelines for Conducting Research with Children or Young People**, and answer the below questions with reference to the guidelines.

Please note: In line with University Academic Regulations the signed completed Ethics Form must be included as an appendix to the final research project.

If you have any queries when completing this document, please consult your supervisor (for students) or Faculty Ethics Sub-Committee representative (for staff).



St Mary's Ethics Application Checklist

The checklist below will help you to ensure that all the supporting documents are submitted with your ethics application form. The supporting documents are necessary for the Ethics Sub-Committee to be able to review and approve your application. Please note, if the appropriate documents are not submitted with the application form then the application will be returned directly to the applicant and may need to be re-submitted at a later date.

<i>Document</i>	Enclosed?*	Version No
1. Application Form	Mandatory	
2. Participant Invitation Letter	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable	
3. Participant Information Sheet(s)	Mandatory	
4. Participant Consent Form(s)	Mandatory	
5. Parental Consent Form	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable	
6. Participant Recruitment Material - e.g. copies of posters, newspaper adverts, emails	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable	
7. Letter from host organisation (granting permission to conduct study on the premises)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable	
8. Research instrument, e.g. validated questionnaire, survey, interview schedule	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable	
9. DBS certificate available (original to be presented separately from this application)*	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable	
10. Other Research Ethics Committee application (e.g. NHS REC form)	<input type="checkbox"/> Yes <input type="checkbox"/> No	

	<input checked="" type="checkbox"/> Not applicable	
11. Certificates of training (required if storing human tissue)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable	

I can confirm that all relevant documents are included in order of the list and in one document (any DBS check to be sent separately) named in the following format:

‘Full Name - Faculty – Supervisor’

Signature of Proposer(s):	Joao Carlos do Prado	Date:	03.10.20
Signature of Supervisor (for student research projects):	J. J. Lydon	Date:	6.10.20



Ethics Application Form

1. Name of proposer(s)	Joao Carlos DO PRADO
2. St Mary's email address	197110@live.stmarys.ac.uk
3. Name of supervisor	Assoc. Prof. John Lydon
4. Title of project	Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: challenges and opportunities

5. Faculty or Service	<input type="checkbox"/> EHSS <input type="checkbox"/> SHAS <input type="checkbox"/> Institute of Theology <input checked="" type="checkbox"/> Institute of Education
6. Programme	<input type="checkbox"/> UG <input type="checkbox"/> PG (taught) <input checked="" type="checkbox"/> PG (research) Name of programme: PhD degree
7. Type of activity	<input type="checkbox"/> Staff <input type="checkbox"/> UG student <input checked="" type="checkbox"/> PG student <input type="checkbox"/> Visiting <input type="checkbox"/> Associate

8. Confidentiality	
Will all information remain confidential in line with the Data Protection Act 2018?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
9. Consent	
Will written informed consent be obtained from all participants/participants' representatives?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable
10. Pre-approved Protocol	
Has the protocol been approved by the Ethics Sub-Committee under a generic application?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Not applicable Date of approval:

11. Approval from another Ethics Committee	
a) Will the research require approval by an ethics committee external to St Mary's University?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b) Are you working with persons under 18 years of age or vulnerable adults?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

12. Identifiable risks	
a) Is there significant potential for physical or psychological discomfort, harm, stress or burden to participants?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b) Are participants over 65 years of age?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
c) Do participants have limited ability to give voluntary consent? This could include cognitively impaired persons, prisoners, persons with a chronic physical or mental condition, or those who live in or are connected to an institutional environment.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
d) Are any invasive techniques involved? And/or the collection of body fluids or tissue?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
e) Is an extensive degree of exercise or physical exertion involved?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
f) Is there manipulation of cognitive or affective human responses which could cause stress or anxiety?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
g) Are drugs or other substances (including liquid and food additives) to be administered?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
h) Will deception of participants be used in a way which might cause distress, or might reasonably affect their willingness to participate in the research? For example, misleading participants on the purpose of the research, by giving them false information.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
i) Will highly personal, intimate or other private and confidential information be sought? For example sexual preferences.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
j) Will payment be made to participants? This can include costs for expenses or time.	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, provide details:
k) Could the relationship between the researcher/ supervisor and the participant be such that a participant might feel pressurised to take part?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
l) Are you working under the remit of the Human Tissue Act 2004?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
m) Do you have an approved risk assessment form relating to this research?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

13. Proposed start and completion date
<p>Please indicate:</p> <ul style="list-style-type: none"> • When the study is due to commence. • Timetable for data collection. • The expected date of completion. <p>Please ensure that your start date is at least four weeks after the submission deadline for the Ethics Sub-Committee meeting.</p>
<p>When the study is due to commence Tuesday 1st December 2020</p> <ul style="list-style-type: none"> • Timetable for interviews data collection: Tuesday 1st December 2020 • Timetable for questionnaires answers: Wednesday 2nd December 2020 • Timetable for institutional documents collection: Monday 4th January 2021 <p>The expected date of completion: Tuesday 1st June 2021</p>

14. Sponsors/collaborators
<p>Please give names and details of sponsors or collaborators on the project. This does not include your supervisor(s) or St Mary's University.</p> <ul style="list-style-type: none"> • Sponsor: An individual or organisation who provides financial resources or some other support for a project. • Collaborator: An individual or organisation who works on the project as a recognised contributor by providing advice, data or another form of support.
None

15. Other Research Ethics Committee Approval
<p>Please indicate:</p> <ul style="list-style-type: none"> • Whether additional approval is required or has already been obtained (e.g. an NHS Research Ethics Committee). • Whether approval has previously been given for any element of this research by the University Ethics Sub-Committee. <p>Please also note which code of practice / professional body you have consulted for your project.</p>
None

16. Purpose of the study

In lay language, please provide a brief introduction to the background and rationale for your study. *[100 word limit]*

In terms of the rationale and in the context of the research topic the dramatic diminution in the number of teaching religious represents a significant challenge. Lydon (2011:139) points out that the Congregation for Catholic Education's (CCE) 1982 document published seventeen years after the closure of the Second Vatican Council, was the first ecclesial text to signpost this decline which was described by James Sweeney (1999:269) as a disastrous deconstruction.

In the context of school ministry, Peter Berger's (1990) concept of 'plausibility structures' is germane. In essence Berger's claim is that what we find believable is closely connected to the number of people who believe in it. It is easier, therefore, to be influenced by a religious charism if one is surrounded by those who are visibly religious. Collaboration between Brothers and lay leaders and teachers committed to the Marist mission and vision takes on a renewed significance. The key question revolves around the extent to which it is possible to revitalize the prophetic and collaborative global leadership and the charism of the Institute of the Marist Brothers in a context of the significance decline in the number of Marist Brothers internationally.

- To present the basic elements of the Marist Brothers Institute and charism.
- To review the literature on prophetic and collaborative leadership and its contribution to the transmission of the charism.
- To discuss the role of the laity and the Marist Brothers as global leaders in the formation and transmission of the Marist charism.
- To discover what would be the fundamental elements that should guide the role of Marist leaders and formation programs at the global level to ensure the vitality of the charism.

17. Study design/methodology

In lay language, please provide details of:

- a) The design of the study (qualitative/quantitative questionnaires etc.)
- b) The proposed methods of data collection (what you will do, how you will do this and the nature of tests).
- c) The requirement of the participant i.e. the extent of their commitment and the length of time they will be required to attend testing.
- d) Details of where the research/testing will take place, including country.
- e) Please state whether the materials/procedures you are using are original, or the intellectual property of a third party. If the materials/procedures are original, please describe any pre-testing you have done or will do to ensure that they are effective.

- a) The methodology most appropriate for the design of this study is a mixed methods approach. It will allow for the incorporation of different forms of data in the study: pre-existing institutional documents, qualitative interviews and quant questionnaires.

Proposed research methods to be used:

- **One-to-one semi-structured interviews** will be used which will link to the overall research questions. The participants of the interviews will be members of the General Government of the Institute of the Marist Brothers. There will be seven interviews in all, each lasting approximately 45 minutes. All the interviews will be conducted at the General House, of the Marist Brothers, in Rome, Italy via video calling using Zoom.
 - A **questionnaire** with a mixture of closed and open questions will be directed to the Brother Provincials and one lay person from each of the 23 Provinces and 3 Districts of the Marist Institute across the world. They are leaders in middle management.
 - A set of **documents** will be also analysed for the research. These documents are part of the inspirational and directive documents of the Marist Institute. Research will be focused on documents relating to the institutional guidelines for formation programmes, XXII General Chapter of the Marist Brothers Institute, and in particular on the Strategic Plan 2018-2025.
- b) The requirement of the participant is an interview of approximately 45 mins.
Questionnaires will be completed online and will take 30 minutes to complete approximately.
- c) All the interviews will be conducted at the General House (global headquarters), of the Marist Brothers, in Rome, Italy.
- The interviews schedule of questions and the questionnaire questions will address the formation programmes to understand the view of the Marist Institute about leadership and how it is offered to its leaders, seeking to identify the strengths and challenges of these programmes for the vitality and continuity of the Marist charism. At the same time, they will seek to identify the place and role of the brothers and lay Marists in a scenario of significant reduction in the number of religious brothers, a marked increase in the participation of laypeople in the life, mission and leadership of the Institute. The questions will examine how the formation guidelines are helping to ensure greater knowledge and commitment of all the members of the Institute, brothers and laypeople, to the perpetuity of the charism and openness to a new institutional organization

founded on prophetic and collaborative leadership. The participants will have the opportunity to get to know in advance the proposal and objectives of the study that is being done.

- After completion of the interviews and the questionnaire, the data collected will be processed and analysed using data analysis software. The objective will be to identify the elements shared by the participants of the interviews that can contribute to the formation and role of prophetic and collaborative leaders committed to the vitality and perpetuity of the charism at a global level.
- d) The materials are original to this study. The questionnaires will be answered by using the Jisc Online Survey tool. The interviews will be recorded and transcribed with the consent of the participants (**see Appendix I & II: Draft Schedule of Interview Questions and Questionnaire**).

18. Participants

Please mention:

- a) The number of participants you are recruiting and why. For example, because of their specific age or sex.
- b) How they will be recruited and chosen.
- c) The inclusion/exclusion criteria.
- d) For internet studies please clarify how you will verify the age of the participants.
- e) If the research is taking place in a school or organisation, then please include their written agreement for the research to be undertaken.
- f) Please state any connection you may have with any organisation you are recruiting from, for example, employment.

a) Participants

- **Interviews:** For the interviews I will be recruiting eight (8) people using a purposive sample which will be non-representative of the general population. This is because all of them are members of the General Government of the Institute of the Marist Brothers of the Schools and have expert knowledge of the Marist approach to leadership and governance. The participants will be selected according to their roles as the General Superior of the Marist Institute, the General Vicar, General Burser and 5 General Councillors. The reason for choosing these people is because it is their mission to ensure the formation of Marist leaders and the vitality and continuity of the Marist charism at global level, which is particularly salient for my research focus area.
- **Questionnaires:** Fifty-two people will be invited to participate. They are the people responsible for ensuring the formation of leaders and the vitality and continuity of the Marist charism in the countries that make up their Provinces

and Districts in the five continents across the world. Among them 26 are consecrated religious of the Institute of the Marist Brothers and the others 26 are laypeople (men and women) members of the same institution. Also, six (6) members of the Marist Lay Secretariat.

- b) All participants for both the interviews and the questionnaires will receive an invitation letter explaining the purpose of the study and inviting them to participate voluntarily. It will be made clear that it is not compulsory to participate. Members of the General Government will be invited to participate in the interviews and members of the Provinces will be invited to respond to the questionnaire (**see Participant Invitation Letters – Appendix III and IV**).
- c) The criteria for the inclusion of the participants will be their relationship with the Institute of the Marist Brothers, their responsibility in the formation programmes of leaders, their responsibilities in insuring the transmission of the Marist charism, and their knowledge of the Marist institution. There will be no inclusion criteria regarding age, sex or ethnicity but it will be very important that these people are responsible for the processes at the global or Provincial level.
- d) The age range of all participants will be between 20 and 75 years. At the beginning of the questionnaire form there will be a box where the participant will have to mark his/her age group and another to verify that they are over 18 by ticking a box, before they can proceed to complete the questionnaire.
- e) The Institute of the Marist Brothers has provided a written letter granting permission for the research to be undertaken at the Institute of the Marist Brothers at global and provincial levels (**please see Permission Letter attached as a separate file**).
- f) The researcher is also a member of the General Council of the Institute of the Marist Brothers.

19. Consent

If you have any exclusion criteria, please ensure that your Consent Form and Participant Information Sheet clearly makes participants aware that their data may or may not be used.

- a) Are there any incentives/pressures which may make it difficult for participants to refuse to take part? If so, explain and clarify why this needs to be done.
- b) Will any of the participants be from any of the following groups?
 - Children under 18

- Participants with learning disabilities
- Participants suffering from dementia
- Other vulnerable groups.

If any of the above apply, state whether the researcher/investigator holds a current DBS certificate (undertaken within the last 3 years). A copy of the DBS must be supplied separately from the application.

- c) Provide details on how consent will be obtained. This includes consent from all necessary persons i.e. participants and parents.
- a) All participants of the interviews as well as those who will answer the questionnaires will be invited to participate voluntarily and no incentives will be offered to them or any pressure be placed on them to take part. Prior to this, they will have received an invitation letter and a participant information sheet explaining the study, their level of involvement in the study and the researcher's interest in their participation. Based on this letter they will be able to freely accept or not to take part in the study and will be made aware that they can withdraw from the study at any point, which will include requesting to have their data withdrawn if required (**see Appendix VI and VII: Participant Information Sheets**).
- b) No vulnerable groups will be involved in the studies.
- c) Since all participants in the study will be over 20 years of age and will not belong to any vulnerable group, the consent of the participants themselves will be sufficient. Therefore, participants in the interviews will sign a consent form to participate in the interviews and authorise the recording of the interviews for later transcription and analysis. The consent form will state their data will be anonymised. The participants of the questionnaires will receive the invitation and the consent statement will be displayed on the first page of the questionnaire and the participant can only advance to the questions when he/she ticks a box to confirm they have both read the consent statement and give their consent to participate. The consent form will be verified by the respondent of the questionnaire before they complete the questionnaire (**See Appendix VIII and IX: Consent Forms**).

20. Risks and benefits of research/activity

- a) Are there any potential risks or adverse effects (e.g. injury, pain, discomfort, distress, changes to lifestyle) associated with this study? If so please provide details, including information on how these will be minimised.
- b) Please explain where the risks / effects may arise from (and why), so that it is clear why the risks / effects will be difficult to completely eliminate or minimise.
- c) Does the study involve any invasive procedures? If so, please confirm that the researchers or collaborators have appropriate training and are competent to deliver these procedures. Please note that invasive procedures also include the use of deceptive procedures in order to obtain information.
- d) Will individual/group interviews/questionnaires include anything that may be sensitive or upsetting? If so, please clarify why this information is necessary (and if applicable, any prior use of the questionnaire/interview).

e) Please describe how you would deal with any adverse reactions participants might experience. Discuss any adverse reaction that might occur and the actions that will be taken in response by you, your supervisor or some third party (explain why a third party is being used for this purpose).

f) Are there any benefits to the participant or for the organisation taking part in the research?

a) There are no potential risk or adverse effect associated with the research study as this is a study that is not personal in nature, but concerns the broader culture of the Marist religious congregation.

b) Since there are no anticipated risks as the study does not concern private, sensitive or matters of a sexual nature, none should arise, but if they do, participants have complete liberty to stop the interview and withdraw from the study completely. They could also be referred to a third party for support such as the designated person responsible for health and wellbeing in the Marist Community.

c) There will be no invasive procedure used in the research. This study does not require a risk assessment form.

d) Neither the interviews nor the questionnaire will include anything that may be sensitive or upsetting to participants. The research will focus on global institutional issues and not on personal situations of the participants.

e) In the event of any adverse reactions that participants might arise, for example emotional, psychological, sensitive or disturbing topics etc., the investigator will be prepared to stop the interview. Participants would be consulted on whether they would wish to continue or stop the interview. Support from a third party would be sought, if necessary. Third-party support would be important from a neutral source.

f) Yes. The participants would benefit from being able to contribute to the improvement of the processes of leadership formation and to be able to glimpse a future scenario of greater vitality of the Marist charism at institutional level. At the conclusion of the research, they will as well take benefit of being made aware of the research findings which will help their own leadership within the Marist Institute. In terms of the Institute, it would benefit from the results of the study that will offer important elements that it can use in the formation of its leaders and to ensure the vitality and viability of the Marist charism.

21. Confidentiality, privacy and data protection

- Outline what steps will be taken to ensure participants' confidentiality.
- Describe how data, particularly personal information, will be stored (please state that all electronic data will be stored on St Mary's University servers).
- *If there is a possibility of publication, please state that you will keep the data for a period of 10 years.*
- Consider how you will identify participants who request their data be withdrawn, such that you can still maintain the confidentiality of theirs and others' data.
- *Describe how you will manage data using a data a management plan.*
- *You should show how you plan to store the data securely and select the data that will be made publically available once the project has ended.*

- *You should also show how you will take account of the relevant legislation including that relating to data protection, freedom of information and intellectual property.*
- Identify all persons who will have access to the data (normally yourself and your supervisor).
- Will the data results include information which may identify people or places?
- Explain what information will be identifiable.
- Whether the persons or places (e.g. organisations) are aware of this.
- Consent forms should state what information will be identifiable and any likely outputs which will use the information e.g. dissertations, theses and any future publications/presentations.

To ensure the confidentiality of participants, all data, including personal information, will be kept as part of password-protected computer files and in locked rooms in accordance with the Data Protection Act 2018 and General Data Protection Regulations (GDPR) 2018. Data collected during the investigation will be stored safely in the cloud (i.e. St Mary's University One Drive) as it cannot be lost, mislaid or damaged. The data will be kept for at least 10 years due to the possibility of publication of part or all of the doctorate. The only people who will have access to the participants' data will be the researcher and the research supervisors. Finally, all electronic data will be stored on St Mary's University servers.

All participants will be informed in writing and, also orally to the participants of the interviews, that they can withdraw from the research process at any time by making a verbal or written communication to the investigator. All data collected from this participant will be destroyed immediately upon the official withdrawal from the research.

In order to avoid the identification of participants by third parties and to better manage the information, the participant identification data will be codified. If there is a need to locate or remove the participant data regardless of the point of the research study, it will be easy to do so using the code set for the participant (or in the case of questionnaire data provided via the internet a unique identifier code for each participant that they and the researcher will have access to). The findings of the research used will be synthesised so as not to identify persons or geographical locations.

22. Feedback to participants

Please give details of how feedback will be given to participants:

- As a minimum, it would normally be expected for feedback to be offered to participants in an acceptable format, e.g. a summary of findings appropriately written.
- Please state whether you intend to provide feedback to any other individual(s) or organisation(s) and what form this would take.

All participants will receive a written summary of the research enabling them to follow the progress of the investigation and the results it is bringing.

At the level of the Institute of the Marist Brothers, the summary of the research will be sent to the Superior General of the Institute and at the end of the research, a complete copy of the final work of the research (dissertation) will be sent to the institution.

The proposer recognises their responsibility in carrying out the project in accordance with the University's Ethical Guidelines and will ensure that any person(s) assisting in the research/ teaching are also bound by these. The Ethics Sub-Committee must be notified of, and approve, any deviation from the information provided on this form.

Signature of Proposer(s):	Joao Carlos do Prado	Date:	03.10.2020
Signature of Supervisor (for student research projects):	John Lydon	Date:	06.10.2020



Approval Sheet

Name of proposer(s)	Joao Carlos do Prado
Name of supervisor	Assoc. Prof. John Lydon
Programme of study	PhD degree
Title of project	Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Marist Institute: challenges and opportunities

Supervisors, please complete section 1. If approved at level 1, please forward a copy of this Approval Sheet to the Faculty Ethics Representative for their records.

SECTION 1: To be completed by supervisor.			
Approved at Level 1.			
Refer to Faculty Ethics Representative for consideration at Level 2 or Level 3.			
Signature of Supervisor (for student research projects):	J. J. Lydon	Date:	06/10/20

SECTION 2: To be completed by Faculty Ethics Representative.			
Approved at Level 2.			
Level 3 consideration is required by Ethics Sub-Committee.			
Signature of Faculty Ethics Representative:		Date:	

APPENDIX M – PERMISSION TO CARRY OUT RESEARCH FIELDWORK AT THE INSTITUTE OF THE MARIST BROTHERS



Rome, 21st April 2020

Assoc. Prof. John Lydon
Programme Director
MA Catholic School Leadership
Institute of Education, Faculty of EHSS
St Mary's University
Strawberry Hill
Twickenham
London TW1 4SX

Dear Assoc. Prof. John Lydon,

Re: Permission to carry out research fieldwork for PhD Degree in Faculty of EHSS

By this letter, I confirm that Mr. Joao Carlos do Prado, PhD student, Faculty of EHSS, at St Mary's University, Strawberry Hill, Twickenham, London TW1 4SX, England, is allowed to carry out his field research work at the Institute of the Marist Brothers, based in Rome, Italy. The study "Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Marist Institute" will focus on the role and formation of leaders for the vitality and continuity of the Marist charism.

To participate in the study, members of the General Government of the Institute of the Marist Brothers may be invited, as well as brothers and laypeople from the Administrative Units, also known as Provinces and Districts, which constitute the Institute. Institutional documents such as Strategic Plan 2018-2025, XXII General Chapter, Programmes of Formation of Brothers and Lay People among others can be used in the research study as well.

The name of the Institute of the Marist Brothers, if necessary, may be used in the study. However, personal information of the participants in the study should remain anonymous and confidential. We also understand that all information will be safely stored during the time of the study and that all data will always remain confidential.

The study of Mr. Joao Carlos do Prado can be a great contribution to the qualification and definition of policies and institutional programs of formation on the charism at institutional level.

Fraternally,

Bro. Ernesto Sánchez Barba
Institute of the Marist Brothers
Superior General

**APPENDIX N – LETTER INFORMING THAT APPLICATION FOR
ETHICAL APPROVAL OF THE RESEARCH ENQUIRY HAS
BEEN APPROVED**



**St Mary's
University
Twickenham
London**

25 November 2020

Dear Joao

I am writing to confirm that your application for ethical approval of your research enquiry has been approved at Level 2.

Researcher's name: Joao Carlos Do Prado

Regnum: 197110

Title of project: Revitalizing the Prophetic and Collaborative Global Leadership and the Charism of the Institute of the Marist Brothers: challenges and opportunities

Supervisor: Dr John Lydon

Should you have any queries please do not hesitate to contact me.

A handwritten signature in blue ink that reads "M. Mihovilović".

Dr Mary Mihovilović
Institute of Education Ethics Sub-committee Representative