THE JESUIT SAGA IN HIGHER EDUCATION: INHERITED AND MANIFEST

by

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(Under the Direction of Charles Knapp)

ABSTRACT

The declining number of Jesuits requires Jesuit institutions to socialize non-Jesuits, even non-Catholics, into the Jesuit traditions and saga in order to maintain the mission of these institutions. Through interviews with Jesuits, analysis of literature (from founding documents to modern, popular press), and the review of theories surrounding organizational culture, a descriptive statement of the Jesuit saga was developed around three core Jesuit concepts (cura personalis, change, and magis). The descriptive statement reads: an educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help someone at the deepest, most important level.”

A single, instrumental case study was undertaken to explore how higher education administration manifests this Jesuit saga and to provide a detailed description of one particular Jesuit institution’s efforts to socialize its non-academic (administrative) staff in the Jesuit tradition. Questions posed include: how is the descriptive statement of the Jesuit saga manifested in higher education administration; in what ways are administrative staff members
able to identify the Jesuit saga in relation to their responsibilities and daily activities; and what specific socialization activities exist to effectively transmit the proposed Jesuit saga?

Administrators described manifestations of Jesuit saga in great detail, though few manifestations were tied uniquely to the case site. Administrators also identified the recent and intentional socialization activities occurring around the concept of Jesuit identity. The ability to identify these activities existed regardless of participation. Finally, *cura personalis* and *magis* were articulated in relation to both the institution and their own roles, while the concept of change was articulated specifically in relation to efforts to achieve the *magis*. Reflection and inclusiveness were identified as two additional core elements of the Society of Jesus appropriate for inclusion in a descriptive statement of saga. Additional opportunities to apply the concepts of organizational culture to the Society of Jesus and the particular case site are identified.

INDEX WORDS: Organizational culture, Organizational saga, Socialization, Higher education administration, Jesuit education, Society of Jesus
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DEDICATION

Dedicated to Lawrence, without whom none of this would ever have occurred.
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CHAPTER 1

INTRODUCTION

After peaking at more than 8,000 individuals in the late ‘60’s, the number of active members in the Society of Jesus (Jesuits) in the United States dropped to less than 6,000 in the early ‘80’s and currently stands at less than 3,000 (Bernstein, 2011; Gray, 2011). With this drastic decline, the 28 Jesuit institutions in the United States face the challenge of maintaining their Jesuit identity with far fewer Jesuits available to guide the way. As these institutions continue to grow in enrollment, while the number of Jesuits available to serve as administrators decreases, there is an increasing dependence on non-Jesuit, even non-Catholic, administrative staff to help carry on the Jesuit tradition. John Padberg, S.J., articulated his concern in discussing the need to transmit the Jesuit saga:

The handing on of the Jesuit ethos, charism and spirit to the lay co-workers of the Society, who will eventually surely be responsible for Jesuit institutions. Faced with this diminution of numbers, the Jesuits will have to decide in what specific works and institutions the Society will continue to invest its manpower. (Woodrow, 1995, p. 287)

Jesuit institutions of secondary and higher education have a long history. A reduction in Jesuits available to support these institutions places this history at risk:

For more than 450 years, Jesuit education has had a profound effect on our world. Beginning with their first college in Messina, Sicily in 1548, Jesuits soon became known as the schoolmasters of Europe because of their highly regarded schools and their pre-eminence as scholars. The number of Jesuit schools reached 740, and Jesuits were at the center of the intellectual world, beginning a long tradition of educating leaders in all walks of life. (Association of Jesuit Colleges and Universities, 2012c, para. 1)

Fortunately, the Society is committed to education, as the Superior General of the Society of Jesus reminded American Jesuits during the bicentennial of Georgetown University:
The Society of Jesus has always sought to imbue students with values that transcend the goals of money, fame, and success. We want graduates who will be leaders concerned about the society and world in which they live, desirous of eliminating hunger and conflict in the world, sensitive to the need for more equitable distribution of God’s bounty, seeking to end sexual and social discrimination, and eager to share their faith and love of Christ with others. (Cesareo, 1993, p. 29)

Having worked at a Jesuit institution for several years, I had the personal experience of being drawn into the Jesuit culture of the institution, despite being agnostic. What is it about these institutions that creates an environment allowing many staff members to embrace and carry on the Jesuit traditions, even when those traditions were unfamiliar to them prior to arriving at the university or college? Exploring this question provides the opportunity to strengthen the understanding of the practices involved in creating this environment. It also provides an opportunity to study the concepts of organizational culture and how these concepts may impact the environment.

Manifestations of organizational culture, such as symbols, rituals, and sagas, are representations that can be used to pass on core values from one generation to the next, and socialization activities provide the mechanism for disseminating these manifestations. “An organizational saga is a collective understanding of unique accomplishment in a formally established group” (Clark, 1972, p. 178), while “the socialization process is the learning process through which the individual acquires the knowledge and skills, the values and attitudes, and the habits and modes of thought of the society to which he belongs” (Bragg, 1976, p. 3). The organizational saga inherent in Jesuit institutions can provide a basis for socializing new staff. Articulating the content of the Jesuit saga as it relates to educational institutions and the specific activities by which one generation of administrative staff passes it to the next is key.
Jesuit Institutions in the United States

Within the United States, there are 28 Jesuit institutions spread across 19 states, all of which combine to form the Association of Jesuit Colleges and Universities (AJCU). Georgetown University, founded in 1789, was the first U.S. Jesuit institution, and U.S. Jesuit colleges and universities continued to be established throughout the 19th and 20th centuries, with Wheeling Jesuit University, founded in 1954, being the most recent. The critical nature of socializing new staff to the Jesuit saga becomes even more apparent when one considers the relationship between these 28 institutions and the Catholic Church. “Each institution is separately chartered by the state and is legally autonomous under its own board of trustees …” (Association of Jesuit Colleges and Universities, 2012i, para. 1). And while all of these institutions include Jesuits on their faculty (ranging from two to thirty-one (Association of Jesuit Colleges and Universities, 2012j)) and in their administration, both the Jesuit community and the Catholic Church remain clearly separated from the institutions. “Provincials, for instance, do not exercise authority in the external or internal governance of these institutions” (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 9). Thus, while the history of the Church and the Jesuits plays a significant role in the manner in which each of these institutions operates, ultimately, it is up to the independent institutions to ensure the Jesuit history continues to be a core component in the ongoing success of the university or college.

With the reduction in Jesuits come a variety of challenges for these institutions. Ultimately, how does one maintain a Jesuit identity in the midst of a reduced presence of Jesuits themselves? Rice and Austin (1988) emphasize the importance of having an “unusually compelling identification with the institution” (p. 52) in the development of strong morale. Jesuits, by their nature of being members in the Society of Jesus, have this “unusually
compelling identification” with their institutions. They have a unique insight into the organizational culture of Jesuit institutions, which laypersons do not have. This insight comes from the Society’s *nuestro modo de proceder*, or “our way of proceeding.” *Nuestro modo de proceder* represents the shared priorities, core values, and non-negotiable principles guiding every Jesuit (Lowney, 2003). Thus, if this unique understanding of the organizational culture is slowly disappearing, what will this mean for things such as leadership, control, and morale? How will “our way of proceeding” be transferred to the laity, who have not had the same initiation to *nuestro modo de proceder* the Jesuits experienced as part of their preparation to join the Society?

Organizational culture plays a crucial role in the success of an institution and helps provide a context in which to frame an answer to these questions. Tierney (1988) discusses the importance of having a deep understanding of the organization’s culture in order to effectively lead the institution (p. 5). Masland (1985) discusses the role culture plays in providing “unobtrusive controls” to help guide the organization when explicit or implicit controls are weak (p. 166). The 28 colleges and universities that combine to create the AJCU offer a unique perspective on organizational culture. Through their activities, they are able to ensure the ongoing character of the Jesuit educational tradition, even as more laypeople are active in administrative roles in the institutions.

**A Jesuit College Case Study**

The purpose of this research is to explore how a descriptive statement of the Jesuit saga is manifested in higher education administration and to provide a rich description of one particular Jesuit institution’s efforts to socialize its staff in the Jesuit tradition.
First, a descriptive statement of the Jesuit saga was developed based on interviews with members of the Society of Jesus and the review of Jesuit history ranging from official documents utilized in the creation of the Society of Jesus to academic histories to popular press focused on Jesuits as leadership role models. The following statement of the Jesuit saga described its meaning to those who took part in this research project: an educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help someone at the deepest, most important level.”

Second, in order to explore the relationship of the Jesuit saga and the activities occurring at the case site, the following research questions were established:

- How is the descriptive statement of the Jesuit saga manifested in higher education administration at the Jesuit institution being studied?
- In what ways are administrative staff members able to identify the Jesuit saga in relation to their responsibilities and daily activities?
- What specific socialization activities exist to effectively transmit the proposed Jesuit saga?

“One of the advantages of a cultural perspective is that it can force administrators to recognize that paradoxes existing within their institution are not always detrimental” (Peterson & Spencer, 1990, p. 15). The role of laypersons in furthering the goals of Jesuit education could easily become a paradoxical situation when there is a simultaneous existence of the beliefs accompanying the Jesuit tradition and the non-Catholic views that employees may bring with them. Using myself as an example, one would not necessarily expect an agnostic, gay man to be
a motivated supporter of the Jesuit educational tradition, yet, I came to be an ardent supporter of the tradition during my time working at a Jesuit institution. My recollection of the experiences that influenced me include participation in a brown bag lunch series, active mentoring by numerous senior administrators in regard to Jesuit traits such as indifference and charity (though not always specifically articulated as Jesuit traits), and continuous reminders that I was working at a Jesuit institution (for example, walking into the office every day through an archway reminding me to “Fear the Lord”). A detailed case study provides an opportunity to gain a more detailed understanding of specific cultural manifestations and socialization activities rather than relying on one particular employee’s recollections. Other colleges and universities may benefit from understanding the methods used to socialize employees at the Jesuit college case site, in order to adapt those methods to the core values of their educational institutions.

The application of saga to the Jesuit educational tradition is not without its challenges. Both Sackmann and Schein point to the challenges of using manifestations of culture “as valid surrogates for the cultural whole” (Schein, 1990, p. 110). Sackmann (1991) points to manifestations enduring long after they are still relevant and that manifestations may look very much the same in different cultures but actually have very different meanings (for example, pyramids in Egypt represent something different from those in Mexico) (p. 297). Schein (1990) takes the broader view that the challenge “is that [a manifestation] fractionates a concept whose primary theoretical utility is in drawing attention to the holistic aspect of group and organizational phenomena” (p. 110).

Analyzing socialization also involves challenges, as can be seen when reviewing the roles played in the socialization process. Socialization can be viewed from the standpoint of what is occurring to socialize laypersons into the world of the Jesuit saga. One may also consider the
impact that the layperson’s beliefs have on the institutions. The person being socialized is bringing his/her own experiences to the table, as well, and the impact of that experience cannot be ignored (Bragg, 1976; Tierney, 1997; Van Maanan, 1984). “Culture is not discovered by unchanging recruits. Rather, socialization involves a give-and-take where new individuals make sense of an organization through their own unique backgrounds and the current contexts in which the organization resides” (Tierney, 1997, p. 6). Acknowledging the impact of the new recruit on the overall socialization process may play a critical role in understanding the socialization activities at the Jesuit institutions.

Through the use of an individual case study, the opportunity exists to provide a detailed description of saga and socialization activities in one particular bounded system, Le Moyne College. Through the participation of Jesuits and administrative staff at various levels of the organization, the concepts of organizational saga and socialization can be analyzed to identify how the benefits and challenges mentioned are articulated and acted upon in this unique setting. The descriptive statement of the Jesuit saga, as developed through a review of the creation of Society of Jesus, is explored and analyzed to determine how this saga influences daily activity at a Jesuit institution of higher education.
CHAPTER 2
LITERATURE REVIEW
Organizational Culture

Articulating the Jesuit saga and researching its manifestations in administration, staff awareness, and socialization efforts in this case study requires reviewing the concepts of organizational culture, organizational saga, and socialization both broadly and with specific reference to Jesuit history. One primary argument for studying organizational culture is to help people become effective leaders. More specifically, it helps lay leaders of Jesuit institutions who do not come with the same Jesuit knowledge, as do members of the Society of Jesus. Schein’s popular quote, “the only thing of real importance that leaders do is to create and manage culture” (Smart & St. John, 1996, p. 220), places an emphasis on the ability to effectively understand and impact culture. While Meek (1988) would disagree with the strength of Schein’s conviction, indicating “most anthropologists would find the idea that leaders create culture preposterous: leaders do not create culture, it emerges from the collective social interaction of groups and communities” (p. 459), he would still support the critical role understanding culture plays in leading any organization.

Unfortunately, all too often, valuing the role culture plays is something leaders acknowledge too late. “Administrators tend to recognize the organization’s culture only when they have transgressed its bounds and severe conflicts or adverse relationships ensue” (Tierney, 1988, p. 4). Tierney goes on to indicate, “… leaders must have a full, nuanced understanding of the organization’s culture. Only then can they articulate decisions in a way that will speak to the
needs of various constituencies and marshal their support” (p. 5). Leaders face a multitude of decision-making opportunities each day, and “an administrator’s correct interpretation of the organization’s culture can provide critical insight about which of the many possible avenues to choose in reaching a decision …” (Tierney, 1988, p. 5). Looking at culture through a lens focused specifically on higher education, Rice and Austin (1988) point out:

Long before the field of organizational behavior became enamored with the symbolic in the functioning of American corporations, leaders of liberal arts colleges were quite aware of the power and significance of organizational culture in the life of an institution. Indeed, most liberal arts colleges were founded to capture and perpetuate a distinctive culture. (p. 52)

The Society of Jesus is a change-oriented organization. Ignatius of Loyola, the Society’s first Superior General, described the need to be “living with one foot raised” in order to respond to whatever opportunities arose. Founding member Francis Xavier responded, “Good enough. I’m ready,” upon receiving 48 hours notice to embark on a mission to India, where no Jesuit had previously gone (Lowney, 2003). Since a significant aspect of leadership is affecting change, the study of organizational culture plays a crucial role in the ability to be effective in the change arena. As Craig (2004) points out, “understanding organizational culture is important to the study of institutional transformation, to preparing an environment for transformation and to achieving the desired results of innovation” (p. 87). At the same time, “campus cultures do not change easily or willingly. There are too many long-held beliefs and standard operating practices woven into the institution’s tapestry and embedded in the psyche of its personnel core…” (Kuh, 2001, p. 37). Understanding the campus culture allows a better understanding of the manner in which actions can be shaped and efforts made to nudge the organization toward desired change. To gain this understanding, leaders “need to attempt to become cultural
outsiders, or as Heifetz (1994) suggests, they need to be able to ‘get on the balcony’ to see the patterns on the dance floor below” (Kezar & Eckel, 2002, p. 457).

As Masland (1985) indicates, “managing a force such as culture is a difficult task at best. The first step is acknowledging culture’s existence and trying to understand the cultures of individual campuses” (p. 167). Understanding the Jesuit culture thus becomes a critical component for leaders of Jesuit institutions. With the dwindling number of Jesuits in the United States, the assumption that all leaders will come to a Jesuit campus with prior knowledge of the Jesuit culture is no longer possible. Future leaders on Jesuit campuses will need to study the Jesuit culture in preparation to lead, as well as develop mechanisms to help train and develop aspiring leaders within their communities. “A strongly articulated culture tells employees what is expected of them and how to behave under a given set of circumstances” (Masland, 1985, p. 158). Given the impact a declining Jesuit presence can have on the institutions in the AJCU, the concept of a strongly articulated culture is a key research element.

**Defining Culture**

The challenge of studying organizational culture is its titanic nature. Ouchi and Wilkins (1985) provide a sweeping review and history of organizational culture, with over 150 citations, pulling from both the scholarly and popular press. “‘Culture’, as a holistic concept, is far too broad to be the main thrust of any research agenda; the concept needs to be dissected into manageable proportions” (Meek, 1988, p. 465). Within higher education, one can take a variety of approaches, including the student perspective (Bragg, 1976; Kuh, 2001), the faculty perspective (Austin, 2011; Tierney, 1997), and the organizational perspective (Kezar & Eckel, 2002; Weick, 1976).
One of the greatest challenges is the lack of a unifying definition. “Culture is one of those terms that defy a single all-purpose definition, and there are almost as many meanings of ‘culture’ as people using the term” (Ajiferuke & Boddewyn, 1970, p. 154). Allaire and Firsirotu (1984) point to Krober and Kluckhohn’s identification in 1952 of 164 definitions of culture. The attempts to define it have not stopped since then. This lack of a unifying definition opens the doors for researchers to devise their own definitions. There are the more ethereal definitions: “culture is the invisible force behind the intangibles and observables in any organization, a social energy that moves people to act” (Kilmann, Saxton, & Serpa, 1985, p. ix). There are the slightly more practical definitions: “organizational culture … is the shared beliefs, ideologies, or dogma of a group which impel individuals to action and give their actions meaning” (Dill, 1982, p. 307). And there are definitions specific to higher education:

The collective, mutually shaping patterns of norms, values, practices, beliefs, and assumptions that guide the behavior of individuals and groups in an institute of higher education and provide a frame of reference within which to interpret the meaning of events and actions on- and off-campus. (Kuh & Whitt, 1988, p. 13)

Schein provides a precise list of elements:

*Culture* can now be defined as (a) a pattern of basic assumptions, (b) invented, discovered, or developed by a given group, (c) as it learns to cope with its problems of external adaptation and internal integration, (d) that has worked well enough to be considered valid and, therefore (e) is to be taught to new members as the (f) correct way to perceive, think, and feel in relation to those problems. (1990, p. 111)

While van den Berg and Wilderom (2004) keep it simple, defining organizational culture as “shared perceptions of organisational work practices within organisational units that may differ from other organisational units” (p. 571).

As Meek indicated, in order to study culture in more detail, it must be broken down into smaller parts. Reviewing the history of the study of organizational culture provides a mechanism to break things down to allow the development of a more focused literature review. Schein
points to organizational culture’s anthropological roots and indicates “we must not forget that culture as a concept was invented to describe those elements of a social system that were, in many senses, the least changeable aspects of that system” (p. 19). While Ouchi and Wilkins (1985) would place the study of organizational culture squarely in the realm of sociology, Allaire and Firshtrotu (1984) provide a convincing anthropological argument. In their review, they provide a map to guide the reader, dividing anthropological studies into socio-cultural systems and ideational systems. This division separates the schools of thought into those that see the culture as a core component of the social system and those that see culture and social realms in distinct but inter-related ways. Taking this latter approach (ideational), the approaches can be further divided into those that see culture as being in the minds of the individuals (Goodenough, Lévi-Strauss, or Wallace) and those that see culture as being a product of shared meaning (the “symbolic” school of Geertz and Schneider). Going further, the symbolic school can be reviewed along the lines of viewing organizations as defined by their history (either the interpretive, actionalist sociology of organizations or the Institutional school), or organizations as defined by the meanings that its members ascribe to it (phenomenology, symbolic interaction, and ethnomethodology). It is the Institutional school that is pursued in this study. (A great debt is owed to the typology provided by Allaire and Firshtrotu and the clarity of focus provided by their work. The preceding is a descriptive account of their Figure 1 (Allaire & Firshtrotu, 1984, p. 196) and Table 1 (Allaire & Firshtrotu, 1984, p. 221).)

Allaire and Firshtrotu provide the following definition of culture within the symbolic school.

Culture is the fabric of meaning in terms of which human beings interpret their experience and guide their action. It is an ordered system of shared and public symbols and meanings which give shape, direction and particularity to human experience. Culture should not be looked for in people’s heads but in the ‘meanings’ shared by interacting
social actors. The analysis of culture therefore is not an experimental science in search of 
laws but an interpretive one in search of meaning. (1984, p. 221)

Allaire and Firsioatu go on to define the Institutional school and the interpretive, actionalist 
sociology of organizations:

Organizations as a result of their particular history and past or present leadership create 
and sustain systems of symbols which serve to interpret and give meaning to members’ 
subjective experience and individual actions, and to elicit, or rationalize, their 
commitment to the organizations. Such collective meaning-structures are manifested in 
ideologies, myths, values, sagas, ‘character’, emotional structures, etc. (1984, p. 221)

**Manifestations of Culture**

As mentioned previously, “organizational culture … is the shared beliefs, ideologies, or 
dogma of a group which impel individuals to action and give their actions meaning” (Dill, 1982, 
p. 307). How are these beliefs, ideologies, or dogma identified? Focusing on the manifestations 
of these items in the every day world of the organization is one approach, around which a variety 
of descriptions exist. Peterson & Spencer (1990) discuss four layers that can be studied:
geospatial (tangible, physical elements), symbolic (myths, traditions, and artifacts), social 
behavioral patterns), and the values and beliefs (both explicit and implicit). Each layer requires 
the researcher to go somewhat deeper and requires greater effort to uncover. Schein (1984) 
describes starting at the level of visible artifacts, moving deeper to the values governing 
behavior, and then delving into the basic assumptions, which determine how people perceive, 
think and feel (such as the relationship to the environment, the nature of human activity, the 
nature of human relationships, etc.) (p. 4). This last layer may be invisible and taken for granted. 
Kuh and Whitt (1988) provide a broad framework on which to study an organization to reveal 
aspects of its culture. The framework contains aspects focused on more readily apparent items 
(such as physical settings, traditions, or institutional history), items requiring a greater degree of
interpretation (such as missions, norms, and practices), as well as aspects that dig deeper into the organization’s underlying psyche (such as values, beliefs, and assumptions).

Each approach includes within its framework identifying the visible manifestations of the organizational culture. While these are often seen in the “top layer” of the organizational culture, the visible manifestations can represent core values and beliefs that provide an organization’s foundation. Focusing on these visible manifestations offers benefits and challenges. These visible artifacts can provide the basis of individual institutional study, as well as a rich level of detail about the organization, however, it is critical that one pays attention to the fact that they are but part of a culture and do not represent the entirety of the organizational culture (Ajiferuke & Boddewyn, 1970). Schein (1990) warns that focusing on the visible artifacts “fractionates a concept whose primary theoretical utility is in drawing attention to the holistic aspect of group and organizational phenomenon” (p. 110). Keeping in mind that manifestations are just the tip of a cultural iceberg allows one to place the study of these visible artifacts in appropriate context (Sackmann, 1991).

Acknowledging these manifestations as one element of a broad cultural concept, these cultural derivatives provide a mechanism for studying a particular organization’s culture. Identification of symbols, such as language, architecture, and artifacts, is one derivative around which the management of culture can be studied (Meek, 1988; Dill, 1982). Dandridge, Mitroff, and Joyce (1980) explain how “‘organizational symbolism’ refers to those aspects of an organization that its members use to reveal or make comprehensible the unconscious feelings, images, and values that are inherent in that organization” (p. 77). Myths, sometimes referred to as verbal symbols, are another form of cultural derivatives.

Myth is to be defined, not as a false belief, but as the distinctive history of an institution … embodied in written documents, reminiscences, legends and the physical properties of
Myths help anchor the present in the past, and provide meaning which legitimates the social practices of academic life. (Dill, 1982, p. 313)

They can be used to express specific aspects of the organization, help control energy and modify tension, and help maintain the system (Dandridge et al., 1980, p. 79). Rituals also provide an opportunity for studying the activities of an organization. Rituals can include rites of passage, secular ceremony, cultural performances, and rituals of reification, revitalization, resistance, incorporation, investiture, entering and exiting, and healing (Manning, 2000).

Rituals provide continuity with the past. They demonstrate that old values and beliefs still play a role in campus life. Rituals also provide meaning. In an organization with ambiguous goals and uncertain outcomes, the annual convocation ceremony may provide a sense of meaning and direction for personnel. (Masland, 1985, p. 162)

Symbols, myths, and rituals all provide opportunities to manage meaning within the organization (Dill, 1982). Looking to Jesuit institutions, the importance of the symbolic act of “missioning” new presidents provides an example of the importance of cultural derivatives:

As Director of Apostolic Work, the new president, whether Jesuit or not, appointed by the board, should be “missioned” to this Jesuit apostolic aspect of his responsibility by the provincial on behalf of the Society of Jesus. Experience shows that this “missioning”, especially when done publicly, is very meaningful not only to presidents who are Jesuits but very supportive of presidents who are not Jesuits. (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 19)

Rice and Austin pull all of these manifestations together through their assessment of exemplary colleges where faculty morale is very high. “The power of organizational culture is made evident and reinforced through events and structures that are heavily laden with the symbolic – the stories that are told, the people honored, the ceremonies and rituals, the personnel policies, even the architecture” (Rice & Austin, 1988, p. 53). These conceptual tools, or “windows” as Masland (1985) calls them, provide an ability to identify specific aspects of an organization’s culture and review them for both their historical creation and the meaning they
bring to the institution. These windows will provide a mechanism to observe the case site in an effort to answer the core research questions:

- How is the descriptive statement of the Jesuit saga manifested in higher education administration at the Jesuit institution being studied?
- In what ways are administrative staff members able to identify the Jesuit saga in relation to their responsibilities and daily activities?
- What specific socialization activities exist to effectively transmit the proposed Jesuit saga?

**Organizational Saga**

Burton R. Clark introduced the concept of the organizational saga through his 1970 book, *The Distinctive College*, and his subsequent 1972 article, “The Organizational Saga in Higher Education.” “An organizational saga is a collective understanding of unique accomplishment in a formally established group” (1972, p. 178). It “refers to a unified set of publicly expressed beliefs about the formal group that (a) is rooted in history, (b) claims unique accomplishment, and (c) is held with sentiment by the group” (p. 179). Looking at Dandridge, Mitroff, and Joyce’s (1980) definition of myth suggests how sagas represent a heightened form of myth in organizational culture. “Myths display the structured, predominantly culture-specific, and shared, semantic systems that enable the members of a given culture to understand each other and cope with the unknown” (p. 80). The nurturance of myth is a critical component to the management of an institution of higher education (Dill, 1982).

An organizational saga presents some administrative logic, some rational explanation of how certain means lead to certain ends, but it also contains a sense of romance and mystery that turns a formal place into a deeply beloved institution. Participants are passionate to the point where we say they partake of the gospel of the organization. (Clark, 1971, p. 501)
Sagas bring unique benefits to an institution. “A symptom of a powerful saga is a feeling that there are really two worlds – the small blessed one of the lucky few and the large routine one of the rest” (Clark, 1971, p. 511). The saga provides a strong base to which all members of the organization can turn for understanding and guidance. As a manifestation of the organization’s culture, the saga plays a core function in leading the organization. “… Leaders must have a full, nuanced understanding of the organization’s culture. Only then can they articulate decisions in a way that will speak to the needs of the various constituencies and marshal their support” (Tierney, 1988, p. 5). As leaders, there is a crucial role to be played not only in the understanding of the saga, but also in the ongoing nurturance of the myth.

Many academic administrators have an exquisite sense of myth and are skilled in its presentation and maintenance. This requires insuring that the history of an institution … is not forgotten, that it is rewritten, read and known, that individuals who embody that history in their lives are visible and active in the community … (Dill, 1982, p. 314)

In their discussion of organizational spirituality, Konz & Ryan (1999) tie the spirituality of Jesuit institutions directly to an institution’s culture, and ultimately, to the saga the Jesuits have created. The Spiritual Exercises, through which every member of the Society of Jesus has been led, “encapsulate the company’s vision and serve as each Jesuit’s preeminent personal development experience,” and “the merest reference to ‘the Exercises’ allows Jesuit managers to tap a well-spring of energy and goodwill” (Lowney, 2003, p. 114). The core research questions of this study look to identify how a similar experience can occur with administrative staff at Jesuit institutions.

Enduring sagas can be defined through the details of their initiation and fulfillment, and develop over lengths of time rather than around particular moments or events.

The exciting story will erode sooner or later, but it has a stubborn capacity to continue. It is not here today and gone tomorrow; it can be relegated to the shelves of history only by years of attenuation or organizational decline into crisis. (Clark, 1971, p. 502)
The first stage, initiation, is effectively the birth of the saga. Clark describes how initiations usually occur at the start of an institution, at a crisis point, or in an established organization ready for change. “The saga is initially a strong purpose, conceived and enunciated by a single man or small cadre (Selznick, 1957) whose first task is to find a setting that is open, or can be opened to a special effort” (Clark, 1972, p. 180). In the case of Jesuit education, Ignatius and the early Jesuits serve as the single man and small cadre who are instrumental in starting the very first Jesuit educational institution in 1548. In their role as the creators of Jesuit education, these founding members of the Society of Jesus take on a sainthood different from the one later provided by the Catholic Church.

One means of animating symbols, which helps to communicate their meaning to academic life as it is lived, is the canonization of exemplars. Saints are individuals who in harsh or extreme circumstances have personified values necessary for the community to function, thereby earning our respect, our adoration and emulation. (Dill, 1982, p. 315)

Ignatius, as the first General of the Society of Jesus, serves as an icon for what Jesuit education encompasses. For most institutions, the founder is someone remembered through the careful nurturance of myth and shared remembrance of the saga. Jesuit educational institutions, on the other hand, have the very unique opportunity to fulfill Dill’s emphasis on ensuring “individuals who embody that history in their lives are visible and active in the community” (Dill, 1982, p. 314). Jesuit educational institutions have daily, human representation of Ignatius and the founding members of the Society of Jesus on their campuses. The Society of Jesus continues to be an active participant in these institutions, and each Jesuit on campus is effectively a lived representation of the founders of the Society. Other than institutions where the leaders have been descendents of the original founder (such as Berklee College of Music or Oral Roberts University), there may be no other situation quite like having the religious community actively
involved in the institution, thus providing this constant reminder of the initiation of the institution’s saga.

[The Jesuits] embody in a lived and unparalleled way the Jesuit character of our ministry. Our students, colleagues, and alumni respect and identify with Jesuits as being at the heart of Jesuit education. The impression Jesuits make and the apostolic impact they have is profound. (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 13)

The second stage of the saga is fulfillment. Fulfillment centers on “the personnel, the program, the external social base, the student subculture, and the imagery of the saga” (Clark, 1972, p. 181). In order for a saga to become a core part of the organizational culture (e.g. to be fulfilled), the support of each of these elements is necessary. In 2010, the presidents of the 28 Jesuit colleges and universities in the U.S. joined together to issue The Jesuit, Catholic Mission of U.S. Jesuit Colleges and Universities (hereinafter called The Jesuit, Catholic Mission). The Jesuit, Catholic Mission accentuates the value of all of these aspects of fulfillment in highlighting their importance in Jesuit traditions. For example, the presidents reference the “program” in stating “the transforming power of the education of our students as whole persons and the inculcation of our Catholic and Jesuit values so that our students become the kind of persons who are leaders manifesting these values in whatever they do” (p. 6). And, with a living alumni base totaling almost 2 million and a student body totaling almost 220,000 across the AJCU institutions (Association of Jesuit Colleges and Universities, 2012b, 2012i), the “external social base” and “student subculture” can have vast influence if well versed in the Jesuit saga.

“Our students, colleagues, and alumni respect and identify with Jesuits as being at the heart of Jesuit education” (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 13).

Most of our students and colleagues, because of their knowledge of and personal relationship with Jesuits, do not believe that Jesuit education – at least as anything like what they experience it to be – is possible without Jesuits who embody, concretize, or personalize it in the college or university. (p. 14)
An enduring saga is based in the development of something truly unique to the institution and results in enduring symbols, rituals, and imagery (statues, ceremonies, etc.) that help uphold the saga over time. These organizational sagas provide core strength for an institution, allowing for greater stability and enduring support from a variety of key constituencies: faculty, alumni, students, etc. Once established, sagas allow commonly held goals to continue over great lengths of time. The strength of the group's commitment to the goals transcends any individual's desire to move the organization away from the core components that inspired the saga (Clark, 1971, 1972). The 28 Jesuit colleges and universities in the U.S. had the unique benefit of inheriting the Jesuit saga at the time of initiation when each was founded. The strength of the Jesuit saga was something each school could turn to as they created their own individual institutional culture, thus providing a core element of organizational culture to help guide their development and support their success. This Jesuit saga, rooted in the 16th century, continues to be physically present on each campus today. While members of the Society of Jesus provide a human representation of this saga, their numbers continue to decline. So how do these institutions ensure the Jesuit tradition continues to play a strong part in the cultures of these organizations? The answer to that question lies in the concept of socialization.

**Socialization**

“The socialization process is the learning process through which the individual acquires the knowledge and skills, the values and attitudes, and the habits and modes of thought of the society to which he belongs” (Bragg, 1976, p. 3). Relating this specifically to organizational culture, “culture is the sum of activities in the organization, and socialization is the process through which individuals acquire and incorporate an understanding of those activities” (Tierney, 1997, p. 4). With the decreasing number of men entering the Society of Jesus, there is a greater
need for Jesuit institutions to turn to laypeople to support the administrative components of these colleges and universities, while still maintaining the Jesuit character of the institutions. Thus, for Jesuit institutions, socialization is the process that allows laypeople to play a key role in supporting the ongoing fulfillment of the Jesuit educational tradition, regardless of whether they share the same Catholic spirituality at the foundation of these schools.

The presidents of the AJCU place significant emphasis on the importance of socialization, as demonstrated by repeated references throughout *The Jesuit, Catholic Mission*. The presidents acknowledge the role of laypersons in the functioning of the institutions and the critical process of socializing laypersons to the Jesuit tradition.

Each of our colleges and universities in its own way gives priority of attention to being faithful to, deepening, and applying this Catholic, Jesuit character in what it does. The specific means we use for this run into the hundreds, are well resourced and staffed within our institutions, are coordinated by a person charged with the responsibility to further this character, and are shared across our schools and our association so that we learn from and build on the experience of one another. (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 5)

While the titles and roles vary, each institution has some person or office committed to advancing the Jesuit mission and identity of the institution, and these individuals participate in the AJCU’s Mission and Identity Conference (Association of Jesuit Colleges and Universities, 2012f, para. 1). This commitment to mission and identity is also supported by the Society of Jesus: “Programs are to be provided and supported (even financially) to enable lay people to acquire a greater knowledge of the Ignatian tradition and spirituality and to grow in each one’s personal vocation (Society of Jesus, 1995, p. 163)” (Konz & Ryan, 1999, para. 25).

Konz and Ryan (1999) emphasize the importance of matching the spirituality of the employee to the spirituality of the organization, in order to support the culture and traditions of the institution. Dill (1982) provides the example of the School of Organization at Yale
University, which took a strong, focused approach to socialization, through joint appointments and recruitment focused on “a small core of selective graduate schools where students had been intensely socialized to academic values consistent with those of Yale …” (p. 318). These approaches serve well when the supply of potential employees who meet the established criteria is sufficient to meet the demand. However, with the number of practicing Catholics declining in most of the regions containing Jesuit institutions (Koczera, S.J., 2009), tying the socialization process solely to Catholics is an unrealistic approach. There is a necessity in developing a socialization process to support new employees, regardless of their spiritual background, in developing a close connection to the Jesuit saga.

Each of our colleges and universities has created responsibilities, structures, and programs for the hiring, orienting, and developing of faculty and staff according to our Catholic, Jesuit mission. We make available special retreats, seminars in Ignatian spirituality and Jesuit education, programs and colloquia which seek to enhance Catholic, Jesuit identity, development and scholarship opportunities, service and immersion experiences, special events that focus on our mission, and we utilize university convocations, conferences, liturgical celebration, and award ceremonies to articulate our Catholic, Jesuit identity. (Presidents of the Association of Jesuit Colleges and Universities, 2010, p. 11)

“Culture can be a stabilizing influence, providing a sense of continuity and a consistent framework within which behavior can be interpreted” (Kuh & Whitt, 1988, p. 95). Socialization is the learning process that allows members of an organization to understand this stabilizing influence and work effectively together toward a common cause (Austin, 2011; Bragg, 1976; Schein, 1990; Tierney, 1997). “When actions are required, people sharing culture will know what to expect from one another – even if they have not seen one another before” (Van Maanan, 1984, p. 243). In relation to Jesuit institutions, a successful learning process will result in the internalization of the Jesuit tradition. This learning process is an ongoing activity, represented as much by “the less dramatic, ordinary daily occurrences” as it is by “examples that serve as grand
transitional markers” (Tierney, 1997, p. 3). The ability of each institution to successfully navigate the socialization process of laypersons into the Jesuit tradition plays a key role in overcoming the declining presence of the Society of Jesus on the AJCU campuses.

Currently, there are hundreds of programs focused on socialization. The survey responses to the AJCU’s recent mission and identity survey (Association of Jesuit Colleges and Universities, 2012d) provide many examples of the activities occurring at institutions through orientation programs, ongoing educational programs and opportunities, and spiritual exercises and retreats.

Targeted programs involve boards of trustees, faculty, administrators, staff, students, and alumni in richly varied ways. Schools are more and more concerned about hiring for mission in sensitive but effective ways, and about orientation and development programs that include ongoing discussions, seminars, and colloquia. (Association of Jesuit Colleges and Universities, 2012e, para. 3)

Orientation programs take many forms, such as publications outlining the school’s Jesuit, Catholic identity, video-and-discussion programs, and sessions separate from standard human resources events, which focus on orienting individuals to the Jesuit identity, whether those individuals are new staff, new faculty, and even new members of the Board of Trustees.

Ongoing educational activities included brown bag lunch opportunities for monthly reflection on Jesuit mission and identity, roundtable discussions on Ignatian ideals, Ignatian Heritage Week, summer institutes designed to help staff connect their personal vocation with the institution’s Jesuit mission, monthly lecture series focused on current issues in the church, and recognition awards to honor faculty who embody the Ignatian tradition. And for those staff interested in developing an even greater understanding of the Spiritual Exercises developed by St. Ignatius, each campus offers retreat opportunities for staff and faculty to participate in programs led by a spiritual director ranging from a weekend event to an eight-month experience.
Through its efforts to foster the Jesuit, Catholic identity, the AJCU also provides specific activities to support the socialization process for all of its member institutions. Smaller, campus-based activities, such as the series of three videos created to capture the “origin, transformation, and transitions of Jesuit spirituality” (Konz & Ryan, 1999, para. 26), provide some of this support. Other efforts focus on bringing together staff from the 28 Jesuit colleges and universities, including conferences focused on over 30 different fields in higher education, such as chief academic officers, financial aid directors, criminal justice educators, or student affairs administrators. “The Conferences sponsored by the AJCU provide our institutional faculty and staff members with the opportunity to collaborate and network with one another, advance their professional growth and development, and discuss issues affecting Jesuit education” (Association of Jesuit Colleges and Universities, 2012a, para. 1). The AJCU also offers two signature programs (The AJCU Seminar on Higher Education Leadership, and the Ignatian Colleagues Program) for campus leaders specifically identified by the presidents of their institutions (D. I. Howe’s, personal communication, April 16, 2012).

Socialization takes place within various categories of individuals: undergraduate students (Bragg, 1976), graduate students (Austin, 2011; Weidman, Twale, & Stein, 2001), faculty (Tierney, 1997), and, for an example outside the realm of higher education, even wind-surfers (Van Maanan, 1984). It is a two-way street, with those being socialized (typically new members of the organization) also impacting those who are leading the socialization efforts (Bragg, 1976; Tierney, 1997; Van Maanan, 1984). The socialization process is essential to creating this sense of sharing. Rice and Austin (1988) reviewed the high faculty morale of ten institutions, and discovered that the three characteristics common throughout (distinctive cultures, participatory leadership, and organizational momentum) were all strengthened by “an unusually compelling
identification with the institution” (p. 52). This identification is one result of a strong socialization process.

The intensity of an academic culture is determined not only by the richness and relevance of its symbolism … but by the bonds of social organization … For this mechanism to operate the institution needs to take specific steps to socialize the individual to the belief system of the organization, and promote joint activities between colleagues throughout the enterprise. (Dill, 1982, p. 317)

As the number of Jesuits available for leadership roles at Jesuit institutions decreases, the importance of understanding the Jesuit culture becomes even more critical in order for lay people to effectively maintain the institution’s Jesuit nature. Understanding the shared meanings that have developed as part of the history of the Society of Jesus provides an opportunity to identify the core values that need to be transmitted to the laity at these institutions. These core values may be articulated in an organizational saga and observed through a variety of manifestations, such as symbols, myths, and rituals. Studying the transmission of the saga to administrative staff members at the case site allows for a better understanding of the socialization process and to see whether a lay version of *nuestro modo de proceder* has been successfully integrated into the institution.
CHAPTER 3
RESEARCH METHODOLOGY

Conceptual Framework

A key feature of organizational culture research is that, at its foundation, it is a descriptive process, not an evaluative one (Al-Shammari, 1992; Kezar & Eckel, 2002; Tierney, 1988). Wilkins (1983) points to the work of Pascale and Athos, who identified how qualitative studies are able to find differences in organizational culture that go unnoticed in quantitative research. As such, research on organizational culture lends itself to the core qualitative approaches of document analysis, observations, and interviews. Tackling these qualitative approaches has as much variation as the definition of organizational culture itself. Sackmann (1991) points toward Geertz’s desire for “thick description” and Kleinberg’s goal of detailed ethnographies, and develops her own combination of “a phenomenologically oriented, issue-focused interviewing technique with a design of successive comparison” (p. 296). Masland (1985) goes further, providing a guide for taking the three basic qualitative approaches and applying them specifically to organizational culture settings in higher education. McMillan and Schumacher indentify that “qualitative research is first concerned with understanding social phenomena from participants’ perspectives” (2006, p. 315), which serves as a foundation for this case study. Understanding the administrative staff experience at a Jesuit institution and the “meaning they attribute to their experiences” (Merriam, 2009, p. 23) provides insight into how the Jesuit culture is passed on to new staff members. This qualitative case study provides an
opportunity to gain a better understanding of the individual experiences of administrative staff members and how the Jesuit culture influences (or fails to influence) their daily activities.

“The concept of organizational culture can be a powerful analytical tool in the analysis and interpretation of human action within complex organizations. Alternatively, it can be misused to reify the social reality of organizational life” (Meek, 1988, p. 454). Given my own experience working at a Jesuit institution and my interest in organizational saga, the importance of taking an emic approach – “understanding the phenomenon of interest from the participants’ perspectives, not the researcher’s” (Merriam, 2009, p. 14) – is critical, so as to avoid observing only those activities that support my beliefs. Utilizing a variety of data sources is a key aspect of qualitative research (Creswell, 2007, 2009; McMillan & Schumacher, 2006; Merriam, 2009; Yin, 2009), and later discussion of the research design details how the variety of data sources are used to understand the administrative staff experience and achieve an emic approach.

Within the qualitative approach, the research uses a constructivist view, which holds the assumption “that individuals seek understanding of the world in which they live and work,” and that the meanings developed “are not simply imprinted on individuals but are formed through interaction with others … and through historical and cultural norms that operate in individuals’ lives” (Creswell, 2009, p. 8). Utilizing this approach requires gathering data from a broad spectrum of participants and providing those participants the opportunity to share their views. Interpreting those views within the context of the environment requires an understanding of both the overarching context of Jesuit history, as well as the unique aspects of the particular institution of higher education studied.

Viewing culture through the lens of anthropology’s symbolic school provides a framework for researching both the proposed Jesuit saga and the individual experiences of
administrative staff members at a Jesuit institution. The symbolic school views culture as an ideational system (as opposed to a socio-cultural system) where culture is a product of shared meanings and symbols. In applying this cultural school to management theory, it can be broken down further into the Institutional school, with major theorists including Clark and Pettigrew.

The Institutional school looks at the organizational history and how symbols develop that give meaning and build loyalty within the members of the organization (Allaire & Firsirtu, 1984). Research questions build upon this school of thought, looking at how staff members are able to identify the Jesuit saga in relation to their daily activities. Loyalty, in the context of this study, refers to the ability of administrative staff members to incorporate the Jesuit saga into their daily activities, regardless of their prior knowledge or experience of the Jesuit traditions.

The constructivist view, the symbolic school, and the Institutional school all share a focus on how the experiences of an institution’s members (in this case, administrative staff at Le Moyne College), both individually and collectively, lead to shared meaning and understanding of the institution’s culture. How this culture impacts daily activities can be better understood by allowing staff members the opportunity to tell their own stories. Hearing from administrative staff members at various levels of the organization and collecting those individual experiences into a detailed description of the institution provides a unique perspective on how a shared meaning is maintained.

**Saga Development**

Prior to completing the case study, a descriptive statement of Jesuit saga was created. The initial inspiration for the research study was *The Jesuit, Catholic Mission of U.S. Jesuit Colleges and Universities* (Presidents of the Association of Jesuit Colleges and Universities, 2010), which had previously been analyzed for evidence of organizational culture as part of
initial doctoral coursework. That research inspired the dissertation topic, which led to the review of additional materials to narrow the scope from organizational culture to organizational saga.

This led to a review of Jesuit literature ranging from founding documents of the Society of Jesus to histories of the Jesuits to modern, popular press, as part of the development of the dissertation prospectus. Following the defense of the dissertation prospectus, the research methodology was expanded to include interviews with Jesuits at the case site to identify commonalities between Jesuit literature and the experiences of current members of the Society of Jesus.

Based on the analysis of organizational saga, Jesuit history, and experiences of individual Jesuits, Chapter Four develops a descriptive statement of the Jesuit saga, focusing on the elements of *cura personalis*, change, and *magis*. The descriptive statement was specifically created with an educational administration slant to describe a way of proceeding to those who took part in the research project:

- An educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help someone at the deepest, most important level.”

Interview participants across all aspects of the research provided reactions to the descriptive statement as part of the ongoing efforts to develop a reflective description of the Jesuit saga.

(Chapter Four provides greater detail on the development of this statement.)

**Case Study**

A case study strategy was selected for this research. “Anchored in real-life situations, the case study results in a rich and holistic account of a phenomenon” (Merriam, 2009, p. 51). Using
the case study approach allows detailed exploration of the experiences administrative staff members have at a Jesuit institution. Rather than solely studying the concepts of organizational saga and developing a descriptive statement of the Jesuit saga, a case study approach allows a review of how the Jesuit saga exists (or fails to exist) in the actual campus setting.

Case study research is a qualitative approach in which the investigator explores a bounded system (a case) … through detailed, in-depth data collection involving multiple sources of information (e.g., observations, interviews, audiovisual materials, and documents and reports), and reports a case description and case-based themes. (Creswell, 2007, p. 73)

This approach requires analyzing the case setting from multiple perspectives: written documentation produced by the college for a variety of purposes, observations of the college campus and activities, and interviews with a variety of individuals. Within the case study structure, it is important to note that this research is not an evaluative study. “Evaluation research assesses the merit and worth of a particular practice in terms of the values operating at the site” (McMillan & Schumacher, 2006, p. 15). While this case study assesses practices (e.g. socialization activities) in relation to values (e.g. saga), the research does not attempt to judge the merit or worth of the activities. Instead, the research focuses on the existence of the practices and values.

Rather than building a theory on the maintenance of the saga (as might be done in grounded theory research), the case study goal is to provide a highly descriptive account of the environment and experiences at Le Moyne College, so others may learn from this particular institution’s activities. This is important to note, since the research does employ certain characteristics of grounded theory, such as developing the descriptive statement of Jesuit saga through constant comparative methods and the purposeful avoidance of conducting detailed research on the case site itself until after the initial descriptive statement of the Jesuit saga was
completed. While aspects of grounded theory may seem apparent, the research focus was the case study, which was “richly descriptive in order to afford the reader the vicarious experience of having been there,” as well as to allow “the reader to assess the evidence upon which the researcher’s analysis is based” (Merriam, 2009, p. 258).

As Donmoyer describes, “case studies can take us to places where most of us would not have an opportunity to go” (Merriam, 2009, p. 258). Gaining a deep perspective on how every Jesuit educational institution maintains its Jesuit mission amidst the decline in the Jesuit membership would require a time-frame beyond that available to most people interested in understanding the phenomenon. This particular case study provides a unique look into the experiences of one particular institution. In order to achieve this, the research questions focus on core issues to guide the field experience in ways that allow for a deep description on core themes, rather than a generalized description of a broad topic. Achieving this detailed description requires an authentic narrative. “A narrative is authentic when readers connect to the story by recognizing particulars, by visioning the scenes, and by reconstructing them from remembered associations with similar events” (Connelly and Clandinin in McMillan & Schumacher, 2006, p. 332).

The case study approach brings with it a limitation on generalizing any findings. The vivid description produced is, in fact, a representation of the experiences of a very specific group of individuals. Whether these experiences translate to other institutions of higher education, both Jesuit and non-Jesuit, is not assured. However, “the force of a single example is underestimated” (Flyvbjerg in Merriam, 2009, p. 53), and “it is the reader, not the researcher, who determines what can apply to his or her context” (Erickson in Merriam, 2009, p. 51). The research goal is to
provide a rich and thick description of the case, allowing others to take what is most relevant to their individual interests.

This research utilizes a single instrumental case study. “In a single instrumental case study (Stake, 1995), the researcher focuses on an issue or concern, and then selects one bounded case to illustrate this issue” (Creswell, 2007, p. 74). Specifically, the concern centers on the maintenance of the Jesuit saga as the number of practicing Jesuits decreases, and the bounded case is Le Moyne College. In selecting the case, the decision was first made to focus on Jesuit institutions. This decision was based on several characteristics that make the Jesuits unique: their focus on being an active part of the community; their status as one of the few completely new religious orders created (compared to other religious groups that formed around previously existing “Rules”); their early commitment to education, in a way unlike any previous religious order; and their status as the largest Catholic network of higher education in the U.S. (Chapple, 1993; Knowles, 1966; Lowney, 2003; O’Malley, 1993; Woodrow, 1995).

After focusing on Jesuit institutions, Le Moyne College was selected based on unique aspects of its heritage and existence. First, Le Moyne is one of the youngest Jesuit institutions in the United States, having been founded in 1946 (see Table 1). As one of only three Jesuit institutions in the United States founded in the past 100 years, Le Moyne has not had the length of time available to establish its own institutional saga as compared to the other Jesuit institutions. This may mean Le Moyne has an even greater reliance on an external saga, potentially the over-arching Jesuit saga, than on its own individually developed institutional saga. Second, Le Moyne recently completed the development of a new strategic plan (OneLeMoyne) and vision: “to be a premier Jesuit college where diverse talents meet to foster academic excellence, integrity, and a commitment to justice” (Le Moyne College, 2012).
Table 1 – Association of Jesuit Colleges and Universities – Years Founded

<table>
<thead>
<tr>
<th>Institution</th>
<th>State</th>
<th>Founded</th>
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<tbody>
<tr>
<td>Georgetown University</td>
<td>DC</td>
<td>1789</td>
</tr>
<tr>
<td>Saint Louis University</td>
<td>MO</td>
<td>1818</td>
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<tr>
<td>Spring Hill College</td>
<td>AL</td>
<td>1830</td>
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<tr>
<td>Xavier University</td>
<td>OH</td>
<td>1831</td>
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<tr>
<td>Fordham University</td>
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<td>1841</td>
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<tr>
<td>College of the Holy Cross</td>
<td>MA</td>
<td>1843</td>
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<tr>
<td>Saint Joseph's University</td>
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<td>Loyola University Maryland</td>
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<tr>
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<td>Loyola University Chicago</td>
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<td>1870</td>
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<tr>
<td>Saint Peter's College</td>
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<td>Regis University</td>
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<td>University of Detroit Mercy</td>
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<td>Creighton University</td>
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<td>Marquette University</td>
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<td>John Carroll University</td>
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<td>University of Scranton</td>
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<td>Seattle University</td>
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<td>Rockhurst University</td>
<td>MO</td>
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<td>Loyola Marymount University</td>
<td>CA</td>
<td>1911</td>
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<td>Loyola University New Orleans</td>
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<td>1912</td>
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<td>Fairfield University</td>
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<td>1942</td>
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<td>Le Moyne College</td>
<td>NY</td>
<td>1946</td>
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<tr>
<td>Wheeling Jesuit University</td>
<td>WV</td>
<td>1954</td>
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Source: AJCU (Association of Jesuit Colleges and Universities, 2012j)

Given these activities, there is the potential for written documentation of the discussion of the Jesuit mission, as well as the possibility to explore the discussions that occurred centering on the Jesuit mission. Finally, Dr. Fred Pestello is the first lay president of the institution, thus providing the specific opportunity to explore the maintenance of the Jesuit saga in an
environment where the leader of the institution is not a Jesuit. At the time of his appointment in 2008, Dr. Pestello was one of only five lay presidents in the Association of Jesuit Colleges and Universities (AJCU). Five years later, he was one of twelve.

The research questions, and the study as a whole, are predicated on the notion that the descriptive statement of the Jesuit saga is present in the institution being studied, and that there is a connection between the saga and the activities of the administrative staff members. Throughout the field research, it was critical to constantly strive to observe the case setting and listen to the participants in a manner allowing for all possible information, rather than searching for the specifics supporting the proposed connection. As Yin (2009) describes, one of the challenges of a single case study is the potential for the study to shift due to different orientations emerging during the collection of evidence (p. 52). While the study is based on the concept that a relationship exists between the proposed Jesuit saga and the activities of the administrative staff members, there was no guarantee this relationship would be demonstrated through the field research. The study’s structure allows for the possibility of participants who do not relate the Jesuit saga to their roles.

**Research Questions**

In order to understand how higher education administration manifests the Jesuit saga and to describe the efforts to socialize administrative staff members in the Jesuit tradition, the research investigates the following core questions:

- How is the descriptive statement of the Jesuit saga manifested in higher education administration at the Jesuit institution being studied?
- In what ways are administrative staff members able to identify the Jesuit saga in relation to their responsibilities and daily activities?
• What specific socialization activities exist to effectively transmit the proposed Jesuit saga?

The first research question focuses on observing the case site for demonstrations of the descriptive statement of the Jesuit saga. The second question focuses on the level of awareness staff members at the institution have of the Jesuit saga’s influence on their actions, and how effectively staff members are able to articulate both their understanding of the saga elements and the relationship between these elements and their roles. Thus, the second research question ties directly to the individual stories of the staff members and requires the researcher to create the opportunity for staff members to share their views on their roles, the institution’s Jesuit identity, and how those intersect. The final research question seeks to identify the transmission of information at specific, planned activities, as well as informal activities, which occurs to support staff members in embracing the Jesuit saga. Understanding staff reactions to these activities helps determine their effectiveness. For example, are staff members able to identify how the socialization activities expanded their understanding of the Jesuit saga, and did expanded knowledge lead to a better understanding of how that knowledge affects their role and performance?

**Research Design**

Emergent design is a critical component of a qualitative case study. Taking an emergent approach allows for a continual reformulation of the research problem, research questions, and approach to data collection based on the information obtained (Creswell, 2009; McMillan & Schumacher, 2006). Thus, for a case study using an emergent approach, the research design provides a road map for data collection, but it is not prescriptive, and deviation may occur. For example, through the use of follow-up questions in interviews, there is the opportunity to pursue
themes and explore implications which, though not part of the original design, may present themselves as critical areas for review (Rubin & Rubin, 2005, p. 151).

Multiple sources of data are critical in a qualitative case study, allowing for more effective analysis and greater reliability. This study utilizes the three sources of data collection common to the recommendations of Creswell (2009), McMillan and Schumacher (2006), Merriam (2009), and Yin (2009): documents, observations, and interviews. David McCallum, S.J., Director of Mission and Identity at Le Moyne College, agreed to support the study by assisting in the collection of relevant documents and identification of activities and staff members who meet the criteria for observation and interviews.

McMillan and Schumacher (2006) point to the importance of describing data collection strategies involved, so other researchers understand the context of the study and could replicate the study. “Data collection strategies” refers to descriptions of the mechanisms by which data was collected – how was data recorded, what collection activities took place (e.g. documents, observations, and interviews, in this case), and what were the primary and secondary collection activities. Ideally, document analysis, observations, and interviews continue until the data collected become redundant and a saturation point is reached. In this particular case, time and fiscal constraints prevent such an exhaustive analysis. For each collection activity, specific goals established in advance indicate the level of data collection attempted and allows the reader to understand the context of the study.

Document Analysis

Yin (2009) raises the important point that documents reviewed as part of qualitative research have all been created for some purpose other than the research at hand. The fact that these documents were not created for the specific purpose of identifying how the Jesuit saga is
communicated to administrative staff members provides a benefit to the study. In an interview environment, a staff member asked about the elements of the descriptive statement may infer that they should say something positive about these elements and their influence. No such inference exists in documents created prior to the start of the research.

Document analysis occurred both as part of the description of the Jesuit saga and as part of the case study. For the development of the descriptive statement, a variety of documents prepared by the AJCU, as well as relevant speeches given by the past three Superiors General of the Society of Jesus, supplement the analysis of Jesuit histories and Jesuit literature, which ranged from the founding documents of the Society to modern, popular press. For the case study, the document analysis focuses primarily on publicly available materials. This includes the college’s website, its archives, staff newsletters, human resources materials focused on recruitment and training, books and articles focused on the founding of the institution, and publicly available records of the strategic planning process and outcome. The analysis of these documents ties to all three research questions. Manifestations of the Jesuit saga, staff awareness of the proposed Jesuit saga, and specific socialization activities for transmitting the Jesuit saga are the primary details captured during document analysis.

Given the time limitation of the study, a particular benefit of utilizing publicly available documents is the ability to complete document analysis off-site and in tandem with observations and interviews. Categories of documents eliminated from the list of prospective documents to be analyzed include: personal records (diaries, personal e-mail, or other private information), records requiring individual permission to obtain (personnel files, confidential meeting records), documents for which the target audience is the student body (the student newspaper), and audio-visual records.
Observations

Two primary forms of observations are part of the data collection process for the case study. The first form of observation focuses on understanding the nature of the case site and includes activities such as taking a campus tour and attending an admissions luncheon; attending campus events, such as a public lecture, the Mass of the Holy Spirit, and the dedication of Mitchell Hall as the Madden School of Business; and wandering the buildings and grounds and otherwise paying close attention to the surroundings while on campus for other purposes. The goal of these activities is to gather a general understanding of the environment and to see and hear references to the Jesuit saga that may exist. Since there is no need to define for others why I am present at the event, these activities provide the opportunity to come closest to the role of “complete observer” (Merriam, 2009). A pure complete observer role cannot exist, since appropriate officials at the college are aware of the research occurring to help avoid any potential awkward situations, such as security officers raising concern at the length of time I am present on the campus. As a complete observer during events such as a campus tour, the ability to take notes without influencing the environment is limited, and thus taking time immediately after these events to capture as much information as possible is critical. Events such as a public lecture or wandering around the campus provide a greater opportunity for taking field notes during the observation.

The second form of observation requires an “observer as participant” role (Merriam, 2009), since an explanation of why I am present at an event is required. Events falling into this category include the mission and identity orientation and an admissions information session. Rather than simply having the leader of such an event describe the program, observing the event allows the opportunity to “notice things that have become routine to the participants themselves,
things that may lead to understanding the context” (Merriam, 2009, p. 119). Observing the
events also provides the opportunity to compare what I witness to later descriptions from the
case study interviews. Participants are aware of my purpose, so field notes are taken with little
attempt to hide what is occurring.

Merriam (2009) describes six critical items to note while observing an event: the
physical setting (where is the event occurring, how is the room set up, what is the environment
like), the participants (who is attending, what are their roles), the activities and interactions (what
actually occurs, who actually participates), the conversations, subtle factors (unplanned activity,
nonverbal communications, actions expected which do not occur), and the researcher’s own
behavior (what am I thinking, how am I acting, am I pulled into the event for any reason).
Capturing as much of this detail as possible strengthens later data analysis.

**Interviews**

Interviews provide an opportunity to gather information neither documents nor
observation can provide. They offer the opportunity to hear an individual discuss what is going
on in their mind – what are their feelings, their concerns, their hopes, and their reservations.

Interviews provide an opportunity to gain insight into an individual’s perceptions (Merriam,
2009). Rubin and Rubin (2005) provide a wonderful metaphor for assembling the interviews to
be used in the case study:

Metaphorically, putting together the main questions, probes, and follow-ups is a little like
playing golf. You have a series of holes, the separate topics of the discussion, each of
which you approach with a main question, a big long drive that you have planned out in
advance. Depending on where your drive lands, you follow-up with other shots,
choosing clubs with different shapes that are most likely to get you close to the green
from where you are. If you hit the ball into the rough – that is, get an answer that is
vague or incomprehensible – you choose a specialized club, the probe, that helps you get
past the difficulty. You continue the probing and the following up until you get the ball
into the hole. You repeat the process again on the next hole with another preplanned
main question, follow-ups, and probes as needed. The holes are connected in a logical order and give structure to the whole game. (p. 158)

For the development of the descriptive Jesuit saga statement, interviews focused on key informants. Key informants are those individuals selected based on special knowledge or status (McMillan & Schumacher, 2006). In this case, the key informants are the Jesuits at the institution, as they have a unique perspective on the Society of Jesus and can provide observations on the Jesuit history. Eighteen Jesuits live in the Jesuit community, so, to start the interview process, three Jesuits were selected based on their length of time as members of the Society – longest, shortest, and median (one invitee declined due to time constraints and an alternate was selected). “Snowball” sampling, also known as chain or network sampling, was utilized to expand the sample, asking participants to recommend others they thought would be able to provide information-rich interviews on the research topic. Each of the initial interviews concluded by asking participants to recommend another Jesuit who they felt would provide a useful, even different, perspective. Those Jesuits recommended were contacted and interviewed. (Three of the five who were recommended were available to participate.) Sampling concluded at that point, having reached a “saturation point,” or a redundancy in the information provided.

The case study interviews focused specifically on administrative staff members. In reviewing organizational culture in higher education, the primary research focus has been on faculty (Austin, 2011; Dill, 1982; Keup, Walker, Astin, & Lindholm, 2001; Kuo, 2009; McMurray, 2003; Rice & Austin, 1988; Tierney, 1997; Trowler & Knight, 2000; Välimaa, 1998) and students (Bragg, 1976; Kuh, 2001; Weidman et al., 2001). There is little, if any, research on the role non-academic (administrative) staff members play in the various aspects of developing and sustaining organizational cultures. As the responsibilities of administrative staff members continue to grow, understanding the role they can play, especially in the socialization process,
becomes even more critical. Looking at Jesuit institutions, a variety of unpublished dissertations have focused specifically on administrators in the field of student affairs. Involving administrative staff members across a variety of areas in higher education administration provides an opportunity to contribute to a better understanding of organizational culture in the educational setting, as well as within the specific realm of Jesuit education.

Interviewing the entire the administrative staff was unrealistic considering both the size of the staff and the time constraints of the research. Therefore, purposeful sampling was used to select participants from a variety of departments and with varying levels of experience. First, the Director of Mission and Identity helped narrow the pool of participants to those working in non-academic (administrative) staff positions. From this pool, individuals were then selected based on their level of demonstrated commitment to the Jesuit mission and identity. Demonstrated commitment was measured based on participation (or lack thereof) in either ACJU sponsored or institutionally sponsored Jesuit identity activities. For example, some were invited based on participation in the AJCU Seminar on Higher Education Leadership or the Ignatian Colleagues Program, both of which require presidential recommendations to participate. Others were invited based on participation in similar campus-level activities. And finally, additional participants were selected from the list of individuals who had not taken part in any AJCU or campus-level Jesuit identity activities.

The goal of this selection process was to provide a broad range of responses, with a particular emphasis on individuals below the “director” level, which would hopefully reflect the broad range of individuals employed on campus. Snowball sampling occurred by asking each administrative staff member in the first round of interviews to suggest someone who could provide an alternate perspective. Additional individuals were purposefully selected to help
broaden the variety of departments represented in the sample. While every effort was made to cover the spectrum of staff represented at the college, the potential for sampling bias cannot be ignored. For example, if all individuals interviewed provide vivid descriptions of how the Jesuit saga influences their daily activities, this cannot be taken to infer that every administrative staff member at Le Moyne has the same view of how the proposed Jesuit saga influences them. Both snowball sampling and targeted selection of staff members across departments and below the director level were utilized in an effort to identify administrators with alternate perspectives on the importance of the proposed Jesuit saga at the institution. A total of fourteen individuals were invited to participate and eleven interviews were conducted. (Two individuals did not respond, and one individual declined due to time commitments.). Of the eleven interviews conducted, three individuals had participated in an AJCU sponsored Jesuit identity program, four had participated in a campus-level Jesuit identity program, and four had not participated in either AJCU or campus-level activities.

Finally, two “elite” interviews were conducted, representing those individuals considered prominent, influential, and well-informed (McMillan & Schumacher, 2006). The president of the institution and the Director of Mission and Identity were interviewed in the final phase of the research. Given the roles these individuals hold in the organization, access and availability were more difficult due to scheduling challenges and time constraints. Since the potential for follow-up was unlikely, the elite interviews were scheduled at the end of the research process, so as to foster development of a focused interview covering core concepts identified from the observations and interviews already completed.

For all participants, interviews were structured in what Yin (2009) refers to as a “focused interview,” utilizing a “standardized open-ended interview” format (McMillan & Schumacher,
2006), in order to cover core questions in a limited time period. All interviews were conducted in-person, were recorded with the participants’ permission, and were then transcribed by an outside transcriptionist. (Appendices A and B include the information and consent form used for all participants, along with the phone script used for scheduling interviews, while Appendices C, D, and E include the interview protocols for the key informants, administrative staff members, and elite interviews, respectively.) The interviews with key informants often allowed for a greater level of follow-up questions to probe for more information, while the interviews with administrative staff members and the “elite” interviews tended to follow the script more closely.

Each group was also asked to comment on the descriptive statement of the Jesuit saga created as part of the research. Since the statement was developed, in part, based on the interviews of the key informants, all six of these participants were sent the statement via e-mail after it was created (one to two months after their interviews) and asked to describe how the statement resonated with them. Four of the six key informants responded with their thoughts on the statement. Administrative staff members were sent the statement via e-mail a few days after their interview and were asked to describe how it resonated with them. Seven of the eleven administrative staff members interviewed responded with their thoughts on the statement. Finally, participants in “elite” interviews were given the statement in writing in advance of the interview, so they could respond with their thoughts as part of the interview process.

For both observations and interviews, McMillan and Schumacher (2006) emphasize the importance of “reflex records.” Completed immediately after the observation or interview, reflex records provide the opportunity to note thoughts, insights, and ideas that may have occurred but were not recorded. They also provide the opportunity to review the notes taken, assess the quality of those notes, and fill in gaps based on memories that are still fresh. The
reflex process is also a mechanism for identifying themes and potential questions for future interviews and observations. Scheduling time for the completion of the reflex process was an important component of the field research process, though timing and availability of participants did not always allow for it to occur.

**Data Analysis**

**Inductive and Comparative Approach**

The data collected from documents, observations, and interviews combine to form what Yin (2009) refers to as a case study database. While the term invokes the image of a computer system, a “database” can be anything from an extensive series of index cards to an intricate software system. The format is less relevant than the concept of developing a structure that gathers the data into a cohesive, organized system. The database not only provides a mechanism to organize the data for analysis, but also creates a record of the raw data used, thus increasing the reliability of the study. Both the development of the database and the analysis of the data start with the collection of the first element of data, whether it is a document, observation, or interview. In qualitative field research, “data collection and data analysis do not proceed in linear progressions. They proceed simultaneously” (Fenno, 1990, p. 84). The simultaneous nature of the activities is a key aspect of the emergent design. For this research, the case study database consists of a variety of documents (interview transcripts, observation notes, transcripts from speeches, documents developed to support Jesuit identity activities, etc.) analyzed to identify core themes. Ongoing analysis of the case study database influences the collection of future elements of the database. For example, speaking with the President of the AJCU as part of the process to gain access to the case site led to additional document analysis of key speeches made by past and present Superiors General of the Society of Jesus.
A further element of the emergent design is an inductive and comparative approach to analyzing the data. While the analysis is built around the core concepts outlined in the research questions of the case study (manifestations, awareness, and socialization), taking a broader view of the data is necessary to understand the answers to the research questions. As outlined by Creswell, “qualitative researchers build their patterns, categories, and themes from the bottom up, by organizing the data into increasingly more abstract units of information” (2009, p. 175). This inductive approach to the data analysis requires constant movement between the various sources of data to identify emergent themes. The inductive approach can also be referred to as a “constant comparative” method whereby segments of data are continuously compared to one another to identify similarities and differences (Merriam, 2009, p. 30). This constant comparison is also necessary to ensure an emic approach, in order to ensure that my own background does not inappropriately influence the findings. Given the inclusion of a descriptive statement of the Jesuit saga as part of the research design, this constant comparison has the potential to influence even the final description of the Jesuit saga. For example, the descriptive statement included as part of the initial dissertation prospectus, which was based solely on the review of Jesuit literature, changed significantly once additional documents and interviews were added to the analysis. Thus, all aspects of the research have the potential to emerge and change during the research process.

Coding all elements of the case study database (documents, observations, and interviews) helps achieve the inductive and comparative approach. Given the emergent design, coding develops and grows with the addition of new units of data. While the initial concepts of manifestations, awareness, and socialization provide a very rudimentary level of a priori coding, new labels evolved immediately upon analyzing the first elements of the database. Merriam
provides several criteria for ensuring the categories developed are useful: they should be responsive to the purpose of the research, exhaustive, mutually exclusive, sensitizing (e.g. easily understood as to the “sense of their nature”), and conceptually congruent (2009, p. 185). As the database grew, the labels were analyzed at regular intervals to identify common themes. As themes emerged, additional coding took these themes into consideration, while continuously adding new labels. Ultimately, the data converged around core themes, and sub-themes, which were used across the database. Thus, elements in the database had to be reviewed on multiple occasions to update the coding to reflect the emerging themes of the study. Typically, an interview was reviewed half a dozen times: listening to the recording to write reflex notes; listening to the recording to edit the transcript and develop initial ideas; listening to the recording to complete the first coding of the transcript; listening to the recording after the completion of all interviews in that category of participants in order to re-code based on the emergent themes; combining all interviews to review, cross-check, and narrow the field of codes; and a final review of all interviews.

Reliability

Ultimately, the entire case study is reliant on ensuring the reliability and trustworthiness of the data collected and the written report. Mechanisms exist to ensure the case report that emerges from the data collection and analysis displays an accurate picture. Triangulation, member checking, “rich, thick description,” prolonged time in the field, and reflexivity are all mechanisms that improve the validity and trustworthiness of the case study (Creswell, 2009; McMillan & Schumacher, 2006; Merriam, 2009; Yin, 2009).

Triangulation uses “multiple investigators, sources of data, or data collection methods to confirm emerging findings” (Merriam, 2009, p. 229). Rather than building the research design
solely around individual interviews, adding the elements of documents and observations to the case study provides a variety of mechanisms for gathering and comparing data. Conclusions drawn from individual interviews, documents, and observations together have a greater level of trustworthiness than conclusions drawn from individual interviews alone. Developing the case study database to collect and preserve data further strengthens the validity obtained through triangulation.

Member checking (Merriam, 2009) provides the opportunity for participants themselves to weigh in on the validity of interpretations. Member checking not only helps ensure accuracy of the field notes, but also helps achieve the goal of maintaining an emic approach to the data. Unfortunately, due to time constraints, the original goal of seeking participant feedback to the written summary of the field notes was not able to occur. However, reactions to the descriptive statement of the Jesuit saga were gathered.

“Rich, thick description” is a hallmark of qualitative case studies, providing the reader with a greater ability to understand the nature of the situation described and how the conclusions may or may not be transferrable. Chapters Four and Five of this dissertation draw deeply from the data collected as part of the collection process. Creating the descriptive statement and telling the case story through descriptive accounts of the environment observed and the use of participants’ own words helps create this rich, thick description.

Prolonged time in the field provides the opportunity to gather an expansive set of data, while allowing time to use a constant comparative approach to determine when the data collection converges around central themes. While time constraints existed, the necessity of prolonged time in the field was not ignored. The Jesuit institution selected for study was visited multiple times during the each phase of the research (gaining access to the site, the development
of the descriptive statement of the Jesuit saga, and the case study), resulting in a dozen visits to the campus over the course of the research project.

Finally, McMillan and Schumacher use the term “reflexivity.”

Reflexivity is a broad concept that includes rigorous examination of one’s personal and theoretical commitments to see how they serve as resources for selecting a qualitative approach, framing the research problem, generating particular data, relating to participants, and developing specific interpretations … In other words, **reflexivity** is rigorous self-scrutiny through the entire process. (2006, p. 327)

Throughout this study, as a researcher, I had to continuously evaluate how the background I brought to the study impacted the manner in which I conducted the research. For example, during the initial analysis of Jesuit literature, I discovered that my own views of higher education were impacting the development of the descriptive statement of the Jesuit saga. I included the concept of collegiality based on recent coursework I had completed on the topic, and I excluded the concept of change based on my own personal experience related to the difficulty of initiating change in the workplace. A more careful and thoughtful review of the Jesuit literature provided multiple examples showing that collegiality would not be part of a descriptive statement of Jesuit saga and that openness to change would be part of that statement. This constant effort to maintain an emic approach helped counter the potential for the study to shift during the research activities and analysis as warned by Yin (2009). At various times in the project, I became aware of drifting toward comparing Le Moyne to other institutions, assessing the effectiveness of the Jesuit identity activities, or focusing on students or faculty, rather than administrators. And, as the number of completed interviews grew, I was aware of the opportunity to view Le Moyne through the lens of a case study on presidential leadership or strategic planning. Applying the concept of reflexivity provided a mechanism to acknowledge what was occurring and to re-focus
on the goal of the study: a case study on the experiences of non-academic administrators in relation to the Jesuit identity of the institution.

I am agnostic. I worked at a Jesuit institution. I only recently started studying organizational culture. I was working under time constraints. I travelled over three hours round-trip for each field research activity. The research is part of an accelerated Ed.D. program. All of these statements impact who I am as a researcher and how I react to the research process, and thus they must constantly be evaluated against the data collected and the analysis completed to ensure that, ultimately, the case study is a detailed description of one particular Jesuit institution’s efforts to socialize its staff in the Jesuit tradition.
Iñigo Lopez de Loyola did not appear to be headed for the priesthood, let alone sainthood, based on the first 30 years of his life. Born in 1491, “the young Iñigo was somewhat turbulent and addicted to gambling, the love of women, quarrels and the pleasures of fighting…” (Woodrow, 1995, p. 33). (In addition to the specific citations listed, the Jesuit History and Jesuit Education sections of this chapter draw from a variety of references: Center for Ignatian Spirituality, 2002; Chapple, 1993; de Aldama, S.J., 1990; Ganss S.J., 2007; Ignatius S.J. & Câmara, 1983; Knowles, 1966; Lowney, 2003; O’Malley, 1993; Woodrow, 1995.) While healing a leg shattered in a military battle, Iñigo read the few books available to him, which were about the life of Christ and various saints. He found himself drawn to religion, and, upon recovering from his injuries, he began a personal quest to reach Jerusalem. Stops along the way with Benedictine monks in Montserrat and the Dominicans in Manresa allowed him extensive periods for prayer, absolution, and the study of Christ. During this time, he began developing the outline of what would become his most significant contribution, the *Spiritual Exercises*. Though he reached Jerusalem, he was forced to leave quickly. Needing to identify how best to pursue his interests, Iñigo focused on education.

He had to start his studies at the very beginning, first learning Latin in Barcelona with grammar school children, and then moving on to the universities of Alcalá and Salamanca. In both Alcalá and Salamanca, Iñigo was imprisoned for speaking in public on religious matters
using his own *Spiritual Exercises* as a guide. Though found innocent by the Spanish Inquisition both times, Íñigo chose to move on and ultimately pursued his studies in Paris. There, he took on the name Ignatius and met Francis Xavier and Pierre Favre. Together, Ignatius, Favre, and Xavier studied at the university and explored their commitment to the Catholic faith.

Both Favre and Xavier took part in the *Spiritual Exercises*, as did Diego Laínez and Alfonso Salmerón in 1533, Nicolás de Bobadilla and Simão Rodrigues in 1534, and Claude Jay, Paschase Broët, and Jean Codure in 1535 and 1536.

Iñigo and [his] set of companions made the decision to go to Jerusalem to ‘spend their lives there helping souls’ or, if that plan should fail, to go to Rome to offer themselves to the pope for whatever he would judge to be ‘for the greater glory of God and the good of souls.’ (O’Malley, 1993, p. 29)

For several years, these men traveled through southern Europe, individually and in small groups, seeking “to help souls,” while awaiting their planned pilgrimage to Jerusalem. In 1537, they settled on the reply that they were of the “Company of Jesus” should others inquire as to their affiliation (the Latin equivalent of “company” is “societus;” thus the name Society of Jesus), and in 1539, they spent several months discussing their future and developing what would ultimately become the *Formula of the Institute* (Center for Ignatian Spirituality, 2002; O’Malley, 1993; Woodrow, 1995). In 1539, Pope Paul III reviewed the initial draft of the *Formula of the Institute*, provided his oral approval, and later provided formal written approval of the Society through the 1540 papal bull *Regimini militantis*.

Three men, in particular, put great effort into ensuring the Society of Jesus had a set of guiding principles that were understood and embraced by the Society. Ignatius of Loyola, who would serve as the first General of the Society until his death in 1556, Juan Alfonso de Polanco, who served as secretary to Ignatius, and Jerónimo Nadal, who would serve in many roles under Ignatius and subsequent Generals. Understanding the importance of organizational culture and
socialization, “Ignatius and his associates were keenly aware that communication of the ideas, goals, and style of the Society did not occur automatically and that it had to be sustained on a consistent and ongoing basis” (O’Malley, 1993, p. 62). Ignatius provided the vision. Polanco was the scribe, capturing the vision that Ignatius articulated and ultimately crafting the guiding principles and much of the early documentation of the Society. And Nadal was the orator, using the story of Ignatius as the foundation of his work. (In many ways, at the AJCU institutions, the Directors of Mission and Identity serve as modern-day “Nadals” for their campuses.)

These men developed, documented, and declaimed core elements to create a Society that drew men to it by its cheerfulness, refinement, graciousness, purposefulness, and affection for one another (O’Malley, 1993, p. 55). They did this through guiding documents different from those utilized by other orders: the *Spiritual Exercises*, for which no prior religious order had anything similar to guide new members (O’Malley, 1993, p. 37); the *Formula of the Institute*, which captured in five short sections the essence of the Society; and the *Constitution*, which provided a clear orientation toward ministry in a manner unseen in the guiding documents of older religious orders (O’Malley, 1993, p. 337). Ultimately, the efforts of these three men helped articulate *nuestro modo de proceder* or “our way of proceeding.”

From the start, the Society was focused on ministry, with the goal of being active in the world “to help souls” wherever help was needed. “They envisioned living in the middle of the currents of life – in the world” (Center for Ignatian Spirituality, 2002, p. 19). The Society was structured in a way to allow the Jesuits (the common name by which they came to be known) to always be focused on ministry. The ability to be mobile and to go wherever there was need was a core aspect of the organization that differentiated them from other religious societies. “They are … the great revolutionaries. They are the last word … in the organization of the religious
order, while they go further than the friars in shedding the traditional monastic character of cloistral life and liturgical prayer” (Knowles, 1966, p. 62). Here we see the influence of St. Ignatius and his admonishment to live life “with one foot raised.”

Half a dozen Jesuits residing at Le Moyne College were interviewed to gain a perspective broader than that provided solely by the literature. As one Jesuit described:

Jesuits have had the tradition of reaching out, whether it’s geographically, socially, culturally, to groups that maybe others have not reached, so, reaching out to … marginalized groups is an important part of the Jesuit tradition.

The importance of missionary work, and the opportunity it provided to learn about the world, was emphasized in the stories told by the Jesuits interviewed. For example:

From the very, very beginning of the Order, all the way back to St. Ignatius sending St. Francis Xavier out to the Indies on Portuguese ships … and then all sorts of other people on these missionary things, but then what did they do? They did their work – missionary work … – but what they also did is they also wrote back. And a crucial element in Jesuit history is always that people were in communication about their experiences in other places of the world.

Another Jesuit described the urgency with which members of the Society were expected to respond to missionary needs:

Jesuit: A Jesuit was supposed to be quite willing to let a letter unfinished … meaning a letter of the alphabet. In other words, the letter “A”...

Interviewer: So, not just the writing of a letter, but literally pick up your pen …

Jesuit: The letter “A” or the letter “D!” Why leave it unfinished? (Clap!) There is a need. Move that quickly. Can I finish the letter “C?” No. No – there’s a need. You have to leave the letter “C” untouched … that notion of mobility for service. But that also means to some extent that by and large Jesuits have to be ready for almost anything.

Jesuits are not monks living in seclusion. “Loyola essentially tore down the monastery walls to immerse his Jesuits in the maelstrom of daily life” (Lowney, 2003, p. 28). Several Jesuits interviewed described the importance of this altered form of monasticism. As one Jesuit indicated:
The Jesuits were part of this somewhat new movement in the 16th century of moving away from a more monastic lifestyle, kind of withdrawing from the world, to the idea that there’s a lot of needs in the world and that there’s holiness in the world, too …

Another Jesuit indicated the importance by explaining:

Contemplative in action … [replacing] the monastic tradition that was contemplative – that your purpose in life was to pray, to meditate, to reflect upon the realities of God and offer worship – with a more outward looking kind of thing … where the effort there was to do things.

Along with becoming active members of society, the Society of Jesus expected members to take on roles necessary to contribute to society. In 1561, Jerónimo Nadal described the many different roles Jesuits pursue as part of this “maelstrom of daily life:”

The Society wants men who are as accomplished as possible in every discipline that helps it in its purpose. Can you become a good logician? Then become one! A good theologian? Then become one! The same for being a good humanist [humanista], and for all the other disciplines that can serve our Institute … and do not be satisfied with doing it half-way! (O’Malley, 1993, p. 61)

One Jesuit interviewed described it this way:

We are a religious order – we’re monks, we’re a monastic order according to canon law … but we carry ourselves – our monastic selves – with us. We, don’t spend long hours of prayer in a cell, like the Benedictines or the Augustinians, or other orders like this. It’s just different. It’s not a question of better or worse. So our vocation, the insight of St. Ignatius, was to have a religious priest whose selves were where they were in the world, so it’s what we would call in Christian theology very incarnational – flesh – we’re to help people. That’s why we’re involved in astronomy, in building mission churches, in teaching geology, and dog sledding in Alaska in order to study … you’ll see that Jesuits do many different things.

And, unique to the Society, Jesuits may be “fully professed” (priests who have taken the formal and final vows of the Society), spiritual coadjutors (priests who have taken initial vows but have not taken final vows), and temporal coadjutors (lay men). Thus, being a Jesuit does not equate, nor has it ever equated, specifically to being a priest. Thus, much of the ministry was done by those who were not ordained (O’Malley, 1993). The commitment was to the Society, not just to
the priesthood – a basic premise from over 450 years ago reflected in the modern day commitment laypeople make in their work at Jesuit universities.

Also unique to the Jesuits is the 4⁰ Vow. The Formula of the Institute, in establishing the structure of the Society of Jesus, states:

… in addition to the ordinary bond of the three vows [poverty, chastity, and obedience], be bound by a special vow to carry out, without subterfuge or excuse and at once (as far as in us lies) whatever the present and future Roman pontiffs may order … (de Aldama, S.J., 1990, p. 9)

This obedience to the Roman pontiff was necessary to support the commitment made by the Jesuits to carry out their ministries. The commitment to the Pope was at the core of the Society’s missionary work, as one Jesuit described:

No one knew the international; no one knew the world; no one knew the church better than the Pope. That was the idea. So that if you want to serve, if you want to be available to do for religious people, to the church in a variety of ways, with a variety of skills, but where can you do the most good? Or, where are there the best opportunities for service, and in the mind of Ignatius, no one would know that more than the Pope would.

At the same time, this commitment of obedience to the Pope should not be interpreted as limiting a member’s ability to make decisions or take action. Dominique Bertrand, S.J., indicates “that in speaking of Jesuit obedience the term ‘submission’ is inappropriate; [preferring] that of ‘a conspiracy to serve the mission’” (Woodrow, 1995, p. 61). Jesuits were given broad latitude to enact the changes they saw necessary to accomplish the goals of the Society. For example, Francis Xavier, the Jesuit who headed to India with a simple “good enough; I’m ready,” opened the very first Jesuit-run school in the world without any consultation with Ignatius (Lowney, 2003). He simply did what he thought was in the best interest of serving the mission of the Society. This level of independence was not simply allowed. It was expected. As Superior General, Ignatius responded to many Jesuit leaders with clear indication that they
were to make the best decisions for their situations: “Whatever means you shall judge to be better in our Lord, I fully approve;” “I leave everything to your judgment and I will consider best whatever you decide;” and “Cut your suit according to your cloth; only let us know you have acted” (Lowney, 2003, p. 163).

The ability to delegate such a high level of autonomy was rooted in *nuestro modo de proceder*. Each Jesuit received clearly articulated education in what it meant to be a member of the Society of Jesus. There was a commitment to each individual’s journey toward membership demonstrated not only in the guidance each received during the *Spiritual Exercises*, but also in the commitment to support each Jesuit’s ability to serve the Society and lead others toward the greater good of the order. This investment in each Jesuit’s education allowed individuals to develop a clear understanding of the Jesuit “way of proceeding.” And, in order to continuously reaffirm this understanding, Jesuits complete a personal *examen* – a contemplation of their actions – several times each day to assess their actions against the expectations of the Society.

As Jules J. Toner, S.J. articulates:

> Obedience issues in an uninterrupted life of heroic deeds and heroic virtues. For one who truly lives under obedience is fully disposed to execute instantly and unhesitatingly whatever is enjoined him, no matter to him whether it be very hard to do. (Lowney, 2003, p. 49)

All of these activities combined to create confidence that each Jesuit would make the right decisions when given the opportunity to do so.

**Jesuit Education**

While establishing colleges for the laity was not the original intent of the founding members, the Society’s commitment to educating their own members placed the organization in an ideal situation to become famed schoolmasters. “The Society of Jesus was born in a university. Its first members were all university students …” (Center for Ignatian Spirituality,
and the initial concept was to recreate the environment that had existed for the founding members.

As important as the facts learned was what was won through the very process of learning: discipline and dedication and willingness to see challenging problems through to their end; the wonder, curiosity, and creativity engendered by looking at the world through a different lens; and the confidence born of solving a problem that once seemed insoluble. (Lowney, 2003, p. 85)

Originally, members of the Society would not teach new members themselves, instead taking advantage of nearby universities. But the Jesuits soon decided they needed to become more actively involved in teaching new members in order to provide the quality of education they desired. Their skill in teaching was quickly noticed, and a nobleman soon offered to support one of their colleges if the Jesuits would allow a few laymen to also attend class. With the success of this venture, the Jesuits were soon asked to found a college for laymen. Not only did the Jesuits agree; they put great effort into its success. Ignatius identified ten Jesuits to create the first college. “Never before had a group of this size been gathered and ‘sent’ for any ministry. Never before had so much talent been concentrated on a single undertaking” (O’Malley, 1993, p. 204). An early letter, encouraged by Ignatius, to Philip II of Spain, captures the importance placed on education. “All the well-being of Christianity and of the whole world depends on the proper education of youth” (O’Malley, 1993, p. 209). With the founding of the first school in Messina in 1548, the Jesuits entered into an area of ministry that would come to define the organization.

The strength of their growing commitment to education can be seen in the changes that occurred in The Formula of the Institute between the 1540 and 1550 versions (the two versions to receive papal approval). In the 1540 version, a single paragraph articulated how the education of future Jesuits would be handled. By 1550, the manner in which education would be handled expanded to six paragraphs (de Aldama, S.J., 1990) – the largest increase in the text. “The
Society was the first religious order to undertake systematically, as a primary and self-standing ministry, the operation of full-fledged schools for any student, lay or clerical, who chose to come to them” (O’Malley, 1993, p. 239). “By the time of St. Ignatius’ death in 1556, 35 schools had been started. A few were universities, but most were similar to our present day high schools” (Association of Jesuit Colleges and Universities, 2010, p. 7). And by 1592, “in the space of 44 years the Jesuits had become a fully fledged teaching order” (Woodrow, 1995, p. 57).

As with other opportunities they tackled, the Jesuits approached education with a willingness to change traditional approaches in order to accomplish their goals. In looking at their curriculum, their teaching was broad. It was not focused solely on Christian religion, but covered subjects most in demand (O’Malley, 1993; Woodrow, 1995). Rather than vocational training, the Jesuit educational approach could have been categorized as the “liberal arts.” As one Jesuit described, “… another feature of Jesuit spirituality, which probably had something to do with the University of Paris, is a deep humanism, including as a humanism, respect for the physical world both as understood in science and in the arts.” Another Jesuit elaborates on this further:

The first thing that comes to mind is … the original goal of Christian humanism, coming out of the Renaissance. One side of it was the humanist tradition that to become a well-educated, well-rounded person, intellectually, academically, but then also the Christian side, so combination of reason with faith. That ideally faith and reason are not two separate, much less two opposed, realms, but rather should be interactive, interconnected. So I think, at its best, Jesuit education, Jesuit tradition kind of helps, or fosters the Christian humanist tradition of becoming both academically and also spiritually a fully developed, integrated person.

The goal of eloquentia perfecta captures the great effort Jesuits put into the success of their educational ventures, as described by another Jesuit:

_Eloquentia perfecta_ – Latin for “perfect eloquence” – or the perfection of eloquence. _Eloquentia perfecta_ means that, and this was, this is very at the root of Jesuit history – educational history – is that one of the purposes of the schools was to create a cadre of
people who could communicate. Who knew how to write, and to speak publicly, who knew how to think and to think in ways that were logical, that were grounded in evidence … that were persuasive...

Schools (secondary and universities) were “an alternative formulation of their favorite description of their ministries, ‘the help of souls’” (O’Malley, 1993, p. 208). The Jesuits unique focus on direct involvement and service to the community led members to be educated and trained for professions in addition to their role in the church. This training created an ideal opportunity for the staffing of schools and universities. The start of the first Jesuit institution of education was quickly followed by many others, and “soon Jesuit astronomers, dramatists, theologians, linguists, painters, musicians, architects, and botanists were populating [Jesuit] schools and university faculties across Europe” (Center for Ignatian Spirituality, 2002, p. 31).

Interestingly, the commitment to education was, in many ways, contradictory to certain elements of the Society. The schools represented a stationary commitment quite different from the goal of mobility to pursue ministry wherever it may be needed – almost an inability to live “with one foot raised.” In addition to the challenge to mobility, the vow of poverty was also challenged by the growing number of schools, whose property was owned by the Jesuits and whose buildings, funded by endowments, housed many members of the Society. However, diverging from the vow of poverty for the sake of education was justified by the fact that “the schools, though run under Jesuit auspices, were institutions of civic import that gave the Jesuits an access to civic life that their churches alone could never provide” (O’Malley, 1993, 242).

The importance of the Jesuit commitment to education can be demonstrated in many ways, whether it be the inclusion of a commitment to teach the poor and the young in the vows taken by Jesuits, or the fact that, even when they were suppressed by Pope Clement XIV, they still managed to found the first Jesuit university in the United States – Georgetown University in Washington, D.C. “To be sure, schools and primitive school networks predated Jesuit efforts,
but no other organization had ever launched a system of such great scale and imagination” (Lowney, 2003, p. 278).

**A Jesuit, Catholic Spirituality**

As was made clear by all of the Jesuits interviewed, Jesuit institutions are not (and should not be) secular institutions. To study Jesuit institutions, one must understand the Catholic nature of the Society that founded these colleges and universities. While a commitment to the Catholic faith is not required for students, staff, or faculty at these institutions, an acknowledgement of the Catholic faith is. “Catholic and Jesuit, descriptors that define us as an institution, are not simply two characteristics among many. Rather, they signify our defining character, what makes us uniquely who we are” (Association of Jesuit Colleges and Universities, 2012g, p. 3). As one Jesuit described:

> We are Cristo-centric … I think if it’s going to be a Jesuit college in other than name, it would take a core belief on the campus in the values we share. One of the recent congregations of the Jesuits said, “people on the campus who share our values but not our faith.” So that’s possible.

Throughout history, the Jesuits have demonstrated a level of openness and accommodation to other cultures and faiths. As a Jesuit described, “the Jesuits tended to be pushing the envelope in trying to be open to enculturation, accommodation, bringing in the best of other cultures into kind of the Christian, Catholic, Jesuit, melting pot.” This openness provides a foundation for the socialization of laypersons – who may not share the specific Catholic religious beliefs – into the culture of a Jesuit institution. In a specific reference to the Chinese Rites and the challenges faced in reconciling the philosophy of Confucius and the religious beliefs of Catholicism, the same Jesuit went on to explain:

> I think it’s safe to say the Jesuits were somewhat on the cutting edge for the 16th century in being much more open to accommodation, to realizing that you can respect other cultures, religions and – as long as something is not opposed to Christian beliefs – in fact,
I think one of the Jesuits said that to become a Christian you don’t have to stop being Chinese.

Additional statements from other Jesuits go back to making clear the importance of Catholicism at a Jesuit institution: “if it’s going to remain Jesuit, it also has to be Catholic,” and “but as I say that [after having explained the concept of “sharing our values but not our faith”], I think, by the same token there has to be a Roman Catholic core.” All in all, the Jesuits interviewed made it clear that there is openness to the involvement of non-Catholic laypersons, but, at its very core, a Jesuit institution must remain Catholic.

Within this Jesuit, Catholic spirituality, a relationship with God stands at the core. As one Jesuit described, there is “a level of really deep belief in the Society of Jesus that every individual, whether they know it or not, is in a relationship with God.” As another described:

Now for us – being religious priests in all of this – making them better people also means bringing them closer to God. But, if they’re not prepared to get closer to God, we can’t say, “Get closer to God!” … you know? All of it is that – we’re not a secular institution. We’re a religious college.

And this relationship requires time for reflection. As one Jesuit describes:

Not everything is about just running out into the world. You need some time to reflect. You need some time to meditate. You need some time to review things, but we would also say to do it in a way that is prayerful, which is being aware of that you’re in a partnership with God in going and doing that … contemplative in action.

Another common Jesuit phrase, “finding God in all things,” captures this relationship with God. As one Jesuit described, “the famous contemplation to acquire the love of God, the last formal exercise in the spiritual exercises, to reflect on God present everywhere, and God working everywhere throughout nature, and how nature in its multiplicity of faces reflects God.”

Consistent references throughout the Jesuit interviews underscore the importance of this aspect of Jesuit, Catholic spirituality. Additional descriptions provided include:
Ignatius would have used the phrase … “finding God in all things.” Defining spirituality not as when we go to church on Sunday, but the whole way we live. If spirituality were a pie, it would not be a piece of the pie; it would be the apples, if it were an apple pie. So, our way of approaching spiritual questions is to do so with spirituality not being a segment of our life, but the substance of it. It’s our life in relationship to God.

And:

The other phrase that’s always used, and it’s implicit in what I was saying before about incarnational stuff, and it’s simply the phrase “finding God in all things.” That’s a recurrent phrase that is, if I’m looking out at the beauty of nature, there is something about that beauty that I apprehend that is not just a flower, and not just a plant, and not just the arrangement that it is, but it has some sort of a almost neo-platonic union with divine beauty in some sort of fashion. So, if my very appreciation of something is beautiful, it kind of reflects something like that.

And finally, “… finding God in all things, that there are needs and there are opportunities everywhere, so that you should be involved in trying to meet people’s needs” – that is the importance of the relationship with God

Jesuit, Catholic spirituality is crucial to each individual institution, and the role it plays in each school’s success cannot be ignored. There is a unique link between the Jesuit, Catholic identity of these institutions and the instruction and activities they provide. While secular institutions may offer an opportunity for students to involve themselves in Catholic activities, such as through a Catholic Newman Club, these opportunities do not have the same depth as what Jesuit institutions offer (Ganss S.J., 2007, p. 195). In socializing administrators to the spirituality present in a Jesuit institution, the goal is not proselytizing or converting people to Catholicism, but is, instead, about helping individuals maintain the vision of Jesuit education.

**Core Elements of the Jesuits**

Many common phrases, features, and historical elements were identified in the Jesuit interviews conducted for this research, as well as within the Jesuit literature reviewed.

Ultimately, the goal of this section of the research is to develop a descriptive saga statement
about the Society of Jesus applicable to an educational setting. Accounting for this goal, three core elements were most apparent: *cura personalis*, change, and *magis*.

**Cura Personalis**

In reviewing the Jesuit literature and the interviews conducted in this phase of the research, the phrase “men and women for others” is mentioned with great frequency. The phrase was born out of the July 31, 1973, speech given by Pedro Arrupe, S.J., 28th Superior General of the Society of Jesus, in Valencia, Spain. Given the recency of the phrase, one could hardly consider it a contributing factor to the Jesuit saga born in the 16th century. However, while “men and women for others” is a phrase born in the 20th century, the concept of caring for others certainly was not. The Jesuits capture this concept of caring in their most common phrase, “to help souls.” Of all the various expressions used to describe the purpose in founding the Society of Jesus, “none occurs more frequently in Jesuit documentation – on practically every page – than ‘to help souls’” (O’Malley, 1993, p. 18).

Many of the Jesuits interviewed made a specific point of needing to translate “to help souls” for modern times. They consistently acknowledged that the term “souls” has a much more religious connotation now than it did in the mid-16th century when St. Ignatius first coined the term. Their comments included:

The notion of the saving of souls – I mean, there’s a very old-fashioned ring to that, and there’s a sense there that probably sounds a little odd within the beginning of the 21st century … I think a contemporary Jesuit would mean something to deal with the full range of the individual, recognizing that human beings have a very profound depth to them.

And:

Well, first of all, nowadays you wouldn’t use the word “souls.” That’s very, very Platonic. So, help people, but with the view that the people are more than bodies, they’re more than physical beings … you have to be careful because that word “soul,” over 400
years, has taken on a connotation that is very, very religious. It would not have had that [in the 16th century].

And:

First of all, the phrase goes back to St. Ignatius … so it’s set in that climate. So the phraseology “to save souls” is kind of culturally set up, right. “To save souls.” I would not use the word “souls” today. It sets in kind of a dualism – I’m not there to save their bodies, I’m there to save their souls. I am going to try and help persons.

Considering it in this light, “men and women for others” is a modernized version of “to help souls,” which successfully removes the “old fashioned ring” of the original phrase. Both phrases are rooted in the concept of caring for others.

In caring for others and meeting a person’s needs, the Jesuits point to the importance of the individuality of each person and the necessity of meeting each person where they are. As one Jesuit described:

What’s the core of Jesuit apostolate – of our service to people? It’s finding people where they are and trying to make them better people, whether this is feeding them, clothing them, writing music so that they can enjoy it, teaching some astronomy. Finding people where they are and using the few talents we have to make them better people.

Over and over, throughout the Jesuit interviews, the idea of finding people where they are and helping each of them to become a better person was key. “We have to be there, but we have to find people where they are. We can’t bring them to a place that they’re not familiar with. We have to start where they are,” is how one Jesuit described this. And finding people where they are requires the acknowledgment of the individualism of every human being, as described by another Jesuit:

There is a meaning to an individual’s historical experience. That the contours and the dimensions of how we live our actual lives and what we have experienced in our life is all potentially a meaningful reality, which, upon reflection, may see itself to be ways in which God is speaking to us.
Meeting an individual where they are and helping meet their full needs as a person is a critical component of the Society of Jesus.

These concepts of helping others, meeting needs, caring for others, and acknowledging the individuality of each person are eloquently captured in the phrase *cura personalis*. Translated from Latin, the term refers to the full care of the person. Simply hearing the phrase “care of the person” brings out the similarity to the phrase “to help souls.” In the speeches of Jerónimo Nadal, he captured the element of caring for others with his phrase, “in the Spirit, from the heart, practically,” thus emphasizing the practicality expected of Jesuits in meeting the needs of those around them. “To help persons” (updating the phrase for the modern era), “the full care of the person” (*cura personalis*), and “in the Spirit, from the heart, practically,” all represent the importance of an outward focus among the Jesuits. The Jesuits did not lead a traditional, monastic lifestyle of withdrawing from the world, but rather focused on engaging the world, helping all persons to the full level of their needs, and ultimately providing service wherever it was needed. This concept of *cura personalis*, a dedication to caring for others and meeting the full needs of those served, is a core element in the saga that was initiated in the establishment of the Society of Jesus and their educational endeavors.

**Change**

A second element identified for the development of the descriptive statement of the Jesuit saga is one mentioned multiple times in describing the development and activities of the Society of Jesus – “change.” Ignatius of Loyola expected members of the Society to live “with one foot raised,” in order to be ready for any opportunity presenting itself. An expectation of obedience existed among the Jesuits in order to take advantage of these opportunities. At the same time, significant education was provided to prepare every member serving others and, once educated,
Jesuits were provided with significant autonomy to move forward in whatever ways they felt met the goals of the Society. These activities all demonstrate a Society open to and willing to embrace change.

The Society of Jesus, itself, was founded in the midst of the immense changes of the 16th century. Consider the question raised by Joseph A Tetlow, S.J., in considering why Ignatius chose the path that eventually led to the formation of the Society of Jesus. “What was he to do with his life as the church was going through agonizing reformation and his stone-walled European world was being blown apart by discoveries of a broad, lush, round world” (2008, p. 3)? The vastness of the change existing at the time of the founding of the Society of Jesus was passionately described by one of the Jesuits:

And, in an increasingly complex world – as, remember, Ignatius is coming out of – in and coming out of – the Renaissance. So in a sense the world has suddenly become a lot more complex, even in terms of discoveries. There are other continents out there! You’re beginning to get the new scientific discoveries and that, so that part of the story at the beginning of the Society of Jesus would be, without over doing it, the New World. So, remember he was born in what, 1491? So that Ignatius and Columbus – Columbus was older, because he was an adult – but 1492, Columbus sails the ocean blue. One year after Iñigo de Loyola, notice, is born in Spain … But part of the power and secret of the Jesuits would simply be, well, “when did they arise?” You know, when did Ignatius, Loyola gather a small group of companions and then organize? When the world was, not really turning but spinning – a wild, I don’t want to be too poetic, but, the world, the human race, human society was taking a wild plunge in the 1490s until Ignatius dies in 1556 … You might say almost nothing was remaining the same at that time. So that, why suddenly would Christianity sort of explode into a lot of the different, if not fragments, a lot of different parts. Well, everything in society was exploding!

In education, specifically, Ignatius was intent on the change necessary to create the most effective educational institutions. “He was unusually alert for whatever of good was evolving in his contemporary world, and daringly courageous in inaugurating on an experimental basis the innovations by which alone liberal education can be kept abreast of the times” (Ganss S.J., 2007, p. 17). Ignatius’ colleagues shared this interest in constant evaluation and improvement.

Correspondence between Ignatius and several other Jesuits demonstrated that:
They discussed and planned ceaselessly in their efforts both to devise a curriculum better adjusted to the emerging needs of their day and to improve their methods of teaching. The early Jesuits had no desire to fall into a comfortable acceptance of routinized educational traditions. (Ganss S.J., 2007, p. 110)

Quite succinctly, Ignatius was “at once conservative and audaciously progressive” (Ganss S.J., 2007, p. 198).

Phrases and examples from both Ignatius and the Jesuits interviewed all point toward the need to live in a way that is prepared for change: “living with one foot raised,” being on the “cutting edge,” the act of “accommodating” new cultures, being willing to “let a letter unfinished.” Ultimately, the Society sought to enable each member to enact the change necessary to accomplish the overall service expectations, which provides an additional core element for the development of a descriptive statement of the Jesuit saga.

*Magis*

Finally, *magis*, or “more,” describes the manner in which caring and change are affected to meet the needs of the full person. As one Jesuit described *magis*:

> The more, the greater, both individually, institutions, even the Church. You only have so much time, so much talent, so many abilities, you can’t do everything; so what’s the *magis*? What’s the most, the best you can do with the time, the resources you have available? … What’s the best thing you can do to help someone at the deepest, most important level?

While striving for the best possible outcome, there is also a deeply rooted expectation of being realistic in your expectations, as the following exchange describes:

Jesuit: And then there’s the *magis*, which is “more” … which, in other words, it’s always the challenge to do more, which sometimes gets corrupted into doing ‘til you drop, but it’s also a concept of choosing always the better.

Interviewer: So it’s not just about doing more things, it’s about selecting the …

Jesuit: Right. To go on vacation would be something “more” in the sense that if you’re dropping from fatigue, rather than adding two and three more things to your plate, to go and revitalize yourself.
Interviewer: So it sounds like there is actually a reasonable expectation within …

Jesuit: Right.

**A Jesuit Saga**

Membership in the Society of Jesus has declined for several decades. While the number of Jesuits in the U.S. was almost 9,000 in 1965, there are now less than 3,000 Jesuits nationwide (Bernstein, 2011). The Society of Jesus acknowledges the challenge this creates for colleges and universities, as does the Association of Jesuit Colleges and Universities (AJCU) (Kolvenbach, S.J., 2004; Nicolas, S.J., 2010; Presidents of the Association of Jesuit Colleges and Universities, 2010). The AJCU estimates less than five percent of faculty, staff, and administrators are currently Jesuits, and they realize this number will continue to decrease (Presidents of the Association of Jesuit Colleges and Universities, 2010). In addition to this drop in the number of Jesuits, the potential for even greater decline exists since over half of the Jesuits in the U.S. are over the age of 60 (Bernstein, 2011). Jesuits interviewed for this research were very aware of these concerns, with one Jesuit indicating:

> All of this [is] presuming that there is a Jesuit available to do that. There’s going to come a point, though, in which, and I don’t know what’s going to happen then, in which there will be little or no Jesuits available to do that, and then the question becomes, how do you bring in, for example, lay people – lay Ignatian spirituality experts – … in which they as well would help in that process. It’s not clear to me how this is going to work itself out, and I’m not sure that there is a solution.

While another Jesuit mentioned:

> We’re extraordinarily rich here with having 18 people in the house, but of that, 8 people or 7 people are over the age of 80. So, I mean, the calendar is going to work on, and we’re going to be down to a small number, probably over the next 10 years it will be much smaller as well.
And a third went on to say:

I’m going down to New York for the ordination. We’re ordaining seven men from the three eastern provinces. Forty years ago, what would that seven have been – seventy, maybe? Or eighty? In some of the recent years no one has taken vows in New York provinces. When, you go back to the time when maybe 40 men a year would take vows. Religious are disappearing.

Alumni of the institutions are also very aware of the issue, as one Jesuit described:

[Alumni], in a healthy sense, worry a lot about that. Because, since they – the ones who went through here 20-30 years ago when there were so many Jesuits – now they know there are very few. In effect they say, “I don’t see how, with a few of you, you can.” It’s almost, “my school has to be different!”

In an effort to counter the effects of the decreasing Jesuit population, the literature and interviews consistently reference the ability to make the most of the small population that exists.

One Jesuit referred to this as the “multiplier effect,” while another referred to how a “small well-knit group can have a big effect on an institution. A Jesuit at Fairfield University talks about how “we can have people over, to talk about how, together, a small group of Jesuits and hundreds of faculty and staff do the Jesuit university thing” (Bernstein, 2011, para. 9). Another Jesuit spoke with great enthusiasm about what can happen when lay staff members learn more about the Jesuit traditions:

I think you have to realize this is contagious – this kind of thing, you know. There are some, in any place in the world, at any institution, there are some people who never buy in to the spirit of the place, okay? But … we now have a large enough group who either made the Spiritual Exercises, or know them quite well, who are, by their very having done it, because this is contagious, you want to encourage your colleague in the history department. Or the faculty member you play tennis with – you want them to … It’s, it’s contagious that way.

The former Superior General of the Society of Jesus, Peter-Hans Kolvenbach, S.J., emphasized the role of the Jesuits in creating this multiplier effect:

The distinctive role of the Jesuits in a Jesuit college or university is to share the basic Ignatian purpose and thrust with the educational community. I am not thinking here of only verbal transmission, but of the communication that is given by witness and
animation; through objectives pursued; through the values discovered and presented to
the academic community in all areas of university life; through the quality of human
relations which are created and encouraged in a Jesuit university. (1989, para. 88)

Across the Society of Jesus and the AJCU, not only is the need for greater development
of lay leadership acknowledged, but also the fact that this lay leadership will come from a
diverse cross-section of religious faiths – even some who do not identify with a particular
religious faith at all (Association of Jesuit Colleges and Universities, 2012g; Kolvenbach, S.J.,
2004). Fortunately, the Society of Jesus demonstrated great foresight in preparing for the
involvement of the laity in achieving the goals of the organization. Looking back to the
foundering documents of the Society, a role for the laity was established through the idea of
coadjutors. This was a uniquely Jesuit creation no other religious order had in place (de Aldama,
S.J., 1990, p. 99). And while modern lay administrators do not take the vows of coadjutors, the
long history of lay involvement in the Society strengthens the ability of lay administrators to
carry on the Jesuit tradition. There is the idea of “people on the campus who share our values
but not our faith.” One Jesuit described it this way:

Some people here are obviously not Catholic, not even Christian, maybe not even, you
know, have religious beliefs, and yet can respect, have a sense of what in the Jesuit
tradition they can be part of. So, it’s not trying to, as such, evangelize or convert people,
but at least give people a sense of what this tradition is … it’s value and trying to take
part in it.

The current Superior General of the Society of Jesus, Adolfo Nicolás, S.J., in speaking to
an international gathering of Jesuit higher education leaders, made clear the importance of
supporting and developing lay leadership:

I am very aware of and grateful for the fact that, in the past 15 years, there has been much
creative and effective work aimed at strengthening the Catholic and Ignatian identity of our
institutions, at creating participative structures of governance, and at sharing our spiritual
heritage, mission, and leadership with our collaborators. I am also very aware of and
delighted to see how our colleagues have become true collaborators – real partners – in the
higher education mission and ministry of the Society. These are wonderful developments
the universities can be proud of and need to continue as the number of Jesuits continues to decline.

I believe we need to continue and even increase these laudable efforts of better educating, preparing, and engaging lay collaborators in leading and working in Jesuit institutions. I can honestly say that this is one of the sources of my hope in the service of the Society and of the Church. If we Jesuits were alone, we might look to the future with a heavy heart. But with the professionalism, commitment, and depth that we have in our lay collaborators, we can continue dreaming, beginning new enterprises, and moving forward together. We need to continue and even increase these laudable efforts. (2010, p. 11)

Combining the concepts of organizational culture with the history of the Society of Jesus provides the opportunity to articulate a Jesuit saga. *Nuestro modo de proceder* guides members of the Society of Jesus in order “to help souls.” How can this “way of proceeding” be articulated to administrative staff at Jesuit institutions to help guide them in preserving the Jesuit mission? As Clark indicated, an organizational saga “refers to a unified set of publicly expressed beliefs about the formal group that (a) is rooted in history, (b) claims unique accomplishment, and (c) is held with sentiment by the group” (1972, p. 179). For the purposes of this study, a descriptive statement of the Jesuit saga is built around elements identified in reviewing the history of the Society and articulated with great sentiment by the Jesuits who were interviewed. The saga statement is built around education as a reflection of the Society’s great accomplishments in this field.

Specifically, the concepts of *cura personalis*, change, and *magis* serve as the foundation of the following descriptive statement used to describe an educational administrator’s way of proceeding:

- An educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and
that continuously supports and encourages the question “what’s the best thing I can
do to help someone at the deepest, most important level.”

In preparing to complete the case study portion of the research, the reaction of at least
one Jesuit suggests the concept of organizational saga is appropriate and important.

Jesuit: Yeah … by the way, an aside, I like the word “saga.”

Interviewer: Do you?

Jesuit: Yes – it’s, I mean, that’s key, because it brings in the historical character of it,
you know, it’s not all pre-determined, it’s a saga …

Interviewer: Mm-hmm …

Jesuit: It has been, it is and it will be, you know?

Interviewer: Mm-hmm …

Jesuit: It’s a saga – it’s an ongoing story. I like that idea.
CHAPTER 5

A JESUIT COLLEGE CASE STUDY

Perched on a hilltop overlooking the beautiful Onondaga County landscape, Le Moyne College is a youthful institution with high aspirations driven by core elements of the Society of Jesus. Located in suburban Syracuse, NY, Le Moyne has a relatively modern and small 160-acre campus, with residence halls on the perimeter, athletic fields on the northern section of campus, and a cluster of buildings making up the academic core of the campus. At first glance, the buildings do not seem overtly religious, though there is a cross or two to be seen, and the Panasci Family Chapel does not seem unusual given the preponderance of chapels on most college campuses, both public and private. But then, between Reilly Hall (one of the primary academic buildings) and Mitchell Hall (recently renovated to house the Madden School of Business), a clear indication of the institution’s Jesuit status stands out – the Loyola Jesuit Residence. Built on prime real estate at the heart of the campus, there is no mistaking the college’s commitment to its Jesuit heritage. The Jesuit residence is home to approximately 20 members of the Society of Jesus. Some retired, some on the College’s faculty, and some in the College’s administration, they are each active to varying degrees in the life of the institution.

Entering buildings on campus, the indicators of the institution’s Catholic identity become more overt. Crucifixes hang in many classrooms (though I was not able to decipher the logic as to which classrooms merited a cross), framed pictures of the college’s past line the halls as a daily reminder of the men in robes and collars who helped create the history of the institution, and a wall of famous Jesuit scientists is prominently displayed in the new science complex.
The science complex is just one component of a significant construction boom occurring over the past few years. In addition to the renovation of Mitchell Hall, renovations have also occurred to the dining hall, the Coyne Science Center, the athletic fields, and Grewen Hall (the first structure built when the campus opened in its permanent home in the 1940’s). Just across the street from the main campus, the College recently acquired and rehabilitated a vacant property to create Le Moyne Plaza, which includes the College’s bookstore, two food establishments, and a large gathering area with a cozy fireplace and space for local singers to entertain.

With enrollment of roughly 2,600 undergraduates and 800 graduate students (Le Moyne College, n.d.-b), the institution is clearly proud of being named to Princeton Review’s 2014 edition of the 378 Best Colleges, as can be seen by dozens of Princeton Review Best Colleges logos stamped onto sidewalks across the campus. Le Moyne’s vision is “to be a premier Jesuit college where diverse talents meet to foster academic excellence, integrity, and a commitment to justice” (Le Moyne College, 2012). The institution markets itself with the tagline “Spirit, Inquiry, Leadership, Jesuit,” as well as the current “Dolphins are …” marketing campaign, which references the institution’s mascot to indicate Dolphins are [scholarly], [enlightened], [involved], [creative], [powerful], [fun], [remarkable], and [exceptional] (the brackets around each word are part of the campaign), with each adjective providing an opportunity to learn more about Le Moyne (e.g. academics, Jesuit tradition, join in, arts, athletics, what to do, alumni, and meet some dolphins, respectively).

Founded in 1946, Le Moyne College was the 27th Jesuit higher education institution to be established in the United States. (Only one more, Wheeling Jesuit University, has been established since then.) *The Le Moyne College Green Book* (2012) and John Langdon’s *Against
The Sky: The First Fifty Years of Le Moyne College (Langdon, 1996) provide a rich history of Le Moyne, from which a few selected items highlight unique characteristics of the institution. The Jesuit historian, George Ganss, S.J., indicated, “To a great extent universities have always been the creation of the populace whose needs and desires they served,” (2007, p. 115) and Le Moyne is no exception to this. Its creation was the result of a fortunate set of well-timed circumstances. The Most Reverend Walter E. Foery, bishop of the Diocese of Syracuse, identified the lack of a Catholic institution of higher education in the Syracuse area as a critical need to be filled. The Maryland-New York Province of the Society of Jesus was looking at potential locations in upstate New York for a new college. And the Servicemen’s Readjustment Act of 1944 (e.g. the G.I. Bill) had just been established to significantly expand veteran’s educational opportunities. These three elements, combined with the incredible support of the Syracuse Catholic community, resulted in Le Moyne’s founding in 1946, as the first Jesuit college founded as a co-educational institution. The community’s support was demonstrated by the door-to-door fundraising campaign in every Syracuse parish in January 1964, raising over $600,000 in just one week for the College (roughly $3.5 million in 2013 dollars). The fortunate timing of the GI Bill and the baby boom also supported the institution in its initial years, as John Langdon noted in his 1996 history. “In the first two decades of its existence, the college rode the crest of the GI Bill and the ‘baby boom’ growing much more rapidly than would have been the case had those two tidal waves not washed over the American landscape” (p. 167).

As might be expected of any young institution, the past 67 years have seen growth in Le Moyne’s size and stature. Since opening its doors in a small storefront, the college has developed its 160-acre campus to include over two dozen buildings, 3,500 students, 250 staff, and 350 full- and part-time faculty. The campus provided the setting in which to observe
activities and events, to review institutional documents and archival materials, and to interview
administrative staff members as part of the case study researching the link between the histories
of the Society of Jesus and Le Moyne College. The information collected during these activities
allows a description of the Le Moyne environment in relation to the manifestations of the Jesuit
identity on campus, the socialization of staff members to understand the relation of Jesuit
identity to Le Moyne College, and the ability of staff members to identify the Jesuit saga in
relation to their roles at the institution.

**Le Moyne College in the AJCU Context**

As the 27th Jesuit higher education institution to be founded in the United States, Le
Moyne is one of only six Jesuit higher education institutions to be founded in the U.S. in the 20th
century. Comparison to other institutions based on a common Jesuit heritage is natural, yet the
28 institutions of the Association of Jesuit Colleges and Universities (AJCU) are all quite
different. The AJCU represents Jesuit colleges established over a 165-year time period in the
United States. These Jesuit institutions represent an impressive coordination of Catholic colleges
in the country, and, working together through the AJCU, they have the opportunity to support
each other’s success in achieving their individual missions. As can be expected across such a
broad course of time, the 28 institutions in the AJCU have evolved to represent a wide variety of
institutional types, ranging from small baccalaureate colleges to large, intensive research
institutions. Their Jesuit heritage plays a critical role in the mission of each, providing a certain
level of continuity across the colleges and universities. At the same time, each has developed in
its own unique way, and the role each brings to the higher education arena is important to
understand so that each school is not lost in the potential generic moniker of “Jesuit college.”
Using a variety of enrollment characteristics to review the AJCU institutions provides a context of Le Moyne in relation to its Jesuit peers and helps identify what makes Le Moyne unique within a group of institutions all built around the same 450-year Jesuit tradition. Two primary sets of data were utilized. First, the AJCU provides summary data on enrollment, faculty, and tuition figures (Association of Jesuit Colleges and Universities, 2012j). This information is available from the association upon request and compares the 28 institutions across a variety of categories, including: Carnegie classification, tuition and fees, enrollment (by various categories), and faculty breakdown. Second, data for the 28 institutions was pulled from the Integrated Post-Secondary Education Data System (IPEDS). Data on admissions, graduation, and institutional characteristics were pulled for academic years 2009-2010 through 2011-2012 to expand on the enrollment data provided by the AJCU. The review of this data allowed for the identification of descriptors such as ranges, medians, means, and quartiles to add context to this qualitative study.

**Carnegie Classifications**

Describing the AJCU institutions by their Carnegie classifications provides a quick perspective on the variety of institutional types represented by Jesuit institutions across the country. As can be seen in Table 2, institutions designated as Master’s (Large) dominate the AJCU, with 16 of the 28 institutions falling into this category. As such, these institutions award at least 200 master’s degrees each year and have very limited doctoral instruction (less than 20 research doctorates awarded per year) (Carnegie Foundation for the Advancement of Teaching, n.d.). The remaining institutions are almost evenly split between smaller master’s or baccalaureate institutions and the doctoral-granting institutions.
Table 2 – AJCU Institutions by Carnegie Classification

<table>
<thead>
<tr>
<th>Carnegie Classification</th>
<th>AJCU Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baccalaureate – Arts &amp; Sciences</td>
<td>College of the Holy Cross</td>
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</tbody>
</table>
| Master’s (Small)                        | Spring Hill College  
|                                        | Wheeling Jesuit University |
| Master’s (Medium)                       | Creighton University  
|                                        | University of Scranton |
| Master’s (Large)                        | Canisius College  
|                                        | Fairfield University  
|                                        | Gonzaga University  
|                                        | John Carroll University  
|                                        | Le Moyne College  
|                                        | Loyola Marymount University  
|                                        | Loyola University – Maryland  
|                                        | Loyola University – New Orleans  
|                                        | Regis University  
|                                        | Rockhurst University  
|                                        | Saint Joseph’s University  
|                                        | Saint Peter’s College  
|                                        | Santa Clara University  
|                                        | Seattle University  
|                                        | University of Detroit Mercy  
|                                        | Xavier University  
| Doctoral/Research                       | Marquette University  
|                                        | University of San Francisco |
| Research (high research activity)       | Boston College  
|                                        | Fordham University  
|                                        | Saint Louis University  
|                                        | Loyola University – Chicago |
| Research (very high research activity)   | Georgetown University |

Source: AJCU (Association of Jesuit Colleges and Universities, 2012j)

Total enrollments at these institutions are, for the most part, aligned with the Carnegie classifications, as demonstrated by the AJCU dataset. All of the doctoral-granting institutions had total enrollment in excess of 9,500 students in 2010-2011, while Master’s (Large) institutions ranged from 2,900 to 11,000, though 75% of the institutions fell within the range of 3,500 to 9,000. Master’s (Medium) institutions fell within the 3,500 to 9,000 range, as well. And finally, the Baccalaureate and Master’s (Small) institutions had total enrollment of less than 3,000. With an enrollment of just over 3,500, Le Moyne is not only one of the youngest Jesuit
institutions, but also one of the smallest Jesuit schools in the Master’s (Large) grouping. Le Moyne’s small size is also reflected in its rankings across other indicators – 4th smallest in graduate enrollment and 6th smallest in full-time undergraduate enrollment.

**Enrollment Characteristics**

Undergraduate characteristics at the AJCU institutions reflect a broad range when reviewing common admissions and retention elements from IPEDS. With admissions rates ranging from 20% to 84% of all applicants and yield on admission offers from 11% to 43%, there are significant differences between the institutions. The inter-quartile ranges for these two characteristics demonstrate a somewhat more consistent representation across the institutions: 55% - 72% admission rate and 17% - 25% yield. Le Moyne is quite close to the median on both characteristics, with an admission rate of 62% and a yield of 18%, compared to medians of 64% and 20%, respectively.

Looking at potential indicators of quality provides a different picture of the college. Le Moyne consistently ranks in the bottom three Jesuit institutions when looking at characteristics such as the inter-quartile range of SAT scores (critical reading and math) and ACT scores (composite, English, and math). Saint Peter’s College and Wheeling Jesuit University typically round out the bottom three in these indicators based on IPEDS data. However, these quality indicators do not translate to lower success when reviewing factors such as retention and graduation. Le Moyne’s retention rate is close to the arithmetic mean and median across the AJCU institutions, and, looking at graduation rates, Le Moyne is very close to the middle of the AJCU institutions.

Diversity factors such as international students and under-represented minorities provide additional items for comparison. Le Moyne’s international enrollment places it in the bottom
two AJCU institutions, with only 0.5% of the undergraduates listed as non-resident aliens per IPEDS. However, as a whole, Jesuit institutions in the United States do not typically enroll large international populations, with over half of the AJCU institutions showing a rate of less than 2%. Under-represented minorities (defined here as American Indian or Alaska Native, Black or African American, Hispanic, Native Hawaiian or Other Pacific Islander, or two or more races) at Jesuit institutions range from 5% to 53%, with an inter-quartile range of 12% - 21%. At ten percent, Le Moyne is well below the median of 14% and arithmetic mean of 17%.

In several other areas, Le Moyne can also be seen as atypical. As one of only five schools in the AJCU not offering a doctorate (one is a baccalaureate institution), Le Moyne is in a small group of Master’s institutions without doctoral programs. (Canisius College, John Carroll University, and Spring Hill College round out the group.) Le Moyne is one of only three AJCU institutions, along with Wheeling Jesuit University and University of Detroit Mercy, which do not offer an ROTC program. And though Le Moyne is like half of the other Jesuit institutions in not offering certificates or degrees below the 4-year bachelor’s level, ten of the sixteen Master’s (Large) schools offer this level of instruction, placing Le Moyne in the minority when looking at that Carnegie classification.

Endowment funding is one area where Le Moyne stands out. While not necessarily impressive from an overall value standpoint (with just over $100 million at the end of the 2010 fiscal year, Le Moyne ranked 20th in total value across the 28 AJCU institutions), Le Moyne’s endowment per FTE ($32,000, again at the end of the 2010 fiscal year) paints a very different picture. On this measure, Le Moyne has moved from 25th place in 2008 to 10th place in 2010, more than doubling the overall value of its per FTE endowment since 2008 – more than twice the rate experienced by the AJCU institution with the next highest increase. The extraordinary $50
million gift from the McDevitt family in 2008 was truly a transformational event for Le Moyne’s endowment (Le Moyne College, 2008).

In summary, Le Moyne is a relatively young school (the 27th of the 28 Jesuit institutions to be established in the U.S.), and many of its characteristics align with what might be expected of a relatively new institution compared to its AJCU peers – it is relatively small at both the undergraduate and graduate level, lacks doctoral instruction, has a small endowment, and admissions indicators (such as SAT and ACT scores) and diversity are low. At the same time, Le Moyne is unusual in that it has a very strong endowment per FTE, ranking tenth in the AJCU, despite its youth, and maintains a Master’s (Large) Carnegie classification despite its relatively small size. Le Moyne also fares well in retention and graduation rates, holding its own in comparison to the other AJCU institutions. Given its youth (and the potential financial strength provided by its endowment), Le Moyne is in a position to carefully craft its future.

**Manifestations**

“The power of organizational culture is made evident and reinforced through events and structures that are heavily laden with the symbolic – the stories that are told, the people honored, the ceremonies and rituals, the personnel policies, even the architecture.” (Rice & Austin, 1988, p. 53)

One of the three research questions driving this case study looks at the manifestations of saga at the case site. As part of the interview process, administrative staff members were specifically asked to discuss the symbolic elements that represent Le Moyne – events, people, stories, and activities – in an effort to uncover manifestations of Le Moyne’s heritage. The difficulty individuals had responding to this request led to several different approaches in an attempt to find a way to draw out the symbolism existing at Le Moyne. Toward the end of the interview process, one individual, who had worked at the institution for over twelve years, stated:
It’s interesting because I’m not really aware of those kind of stories, and it strikes me as an element … I mean there may be others who do have some, maybe they’ve been here longer … but that’s an element that I find yet a bit lacking … From a personal perspective, it’s not an element that I’m seeing yet. Certainly not one that I’m experiencing such that I’m readily rattling off three or four versus what I’ve seen at other institutions.

This particular administrator was not the first, nor the last, to have included a caveat suggesting others on campus, maybe those who’d been there longer, might be better aware of these stories. However, interviews were held with staff members who had worked at Le Moyne anywhere from less than two years to more than twenty years, and the only story told more than once was Dolphy Day – the annual, spring student “drink-fest,” to use one staff member’s term. Usually, those interviewed simply indicated they could not think of any elements to share.

Stories embodying the core elements of the Society of Jesus or the institution do not seem to be readily recognized across the administrative staff members.

In analyzing the interviews, however, certain symbolic elements began to emerge. Rather than responding to the specific question about these elements, they were, instead, interwoven into responses provided throughout the interviews. Considering Rice and Austin’s elements – people honored, ceremonies and rituals, and architecture – Le Moyne is rife with symbols of the Society of Jesus. For example, fall ceremonies, such as the Mass of the Holy Spirit and Fall Convocation, provide an opportunity for the Le Moyne community to come together to celebrate the new academic year and the achievements of the institution. The Mass of the Holy Spirit is a historic tradition at Jesuit educational institutions. As one staff member described, “The Mass of the Holy Spirit is a wonderful tradition. It’s very moving. You’ve got the student singers, which are awesome, and the music is wonderful. You just feel connected.”

Another administrator talked about Fall Convocation. “When you attend those types of events, they really do talk about the Jesuit mission there, and you get to learn about them.”
However, in looking more closely at these symbols, it is clear that they are all relatively new. For example, during Fall Convocation, the college recognizes outstanding staff performance through the *Magis* Award, “to acknowledge an employees pursuit of excellence throughout the year;” and the Ignatian Mission Award, to “acknowledge an employee’s pursuit of the OneLeMoyne vision” (Le Moyne College, n.d.-a). Both awards were only created in the past five years. Similarly, the Mass of the Holy Spirit has only recently been revived in a way that fills the chapel to over-flowing. And visual representations (characterized by Rice and Austin’s reference to architecture) are just now being developed and renewed. For example, Mitchell Hall – once the Jesuit residence and most recently a residence hall – was renovated to house the new Madden School of Business during the time of this research. As part of the renovation, a cross that stood atop the building (which I had not noticed in my initial observations of campus) was placed prominently on the front of the building. In the recently built science complex, a wall of Jesuit scientists was installed to honor famous scientists from the Society of Jesus. Le Moyne’s last president commissioned a small statue of St. Ignatius (affectionately referred to as “Iggy” by some staff), standing about a foot high and housed in a Plexiglas box in the foyer of the main academic hall. (Interestingly, despite having walked by it dozens of times during my visits to campus, I only saw it when I finally purposefully looked for it.) A much larger statue of Ignatius is set be unveiled on campus next year – of which many of the interviewees were readily aware.

Le Moyne College is a young institution, and, as such, an aspect of this research was predicated on the idea that it may rely more heavily on the saga of the Society of Jesus than on any saga developed through their own history. Based on the interviews and observations, there seems to be a certain level of truth to this in relation to manifestations of Le Moyne’s heritage.
Staff members were readily able to reference and provide examples of Ignatian spirituality and core Jesuit elements such as *cura personalis* and *magis*, but they were less able to speak to things uniquely Le Moyne. And the common elements of knowledge that do exist are relatively recent. In reviewing the administrative staff member interviews, only one story was told referencing an event more than ten years old – Dolphy Day. In discussing the Institutional school of thought, Allaire and Firsiootu describe:

> Organizations as a result of their particular history and past or present leadership create and sustain systems of symbols which serve to interpret and give meaning to members’ subjective experience and individual actions, and to elicit, or rationalize, their commitment to the organizations. Such collective meaning-structures are manifested in ideologies, myths, values, sagas, ‘character’, emotional structures, etc. (1984, p. 221)

At this point in its history, Le Moyne College does not appear to demonstrate long-term manifestations of these collective meaning-structures, though it does appear to be building these elements.

**Socialization**

The intensity of an academic culture is determined not only by the richness and relevance of its symbolism … but by the bonds of social organization … For this mechanism to operate the institution needs to take specific steps to socialize the individual to the belief system of the organization, and promote joint activities between colleagues throughout the enterprise. (Dill, 1982, p. 317)

An additional research question for this case study focuses on the specific socialization activities that exist to effectively transmit any existing saga. Le Moyne College has undergone a recent and significant transformation in its efforts to develop employee understanding of the institution’s Jesuit identity. Over and over, staff members referenced the change that has occurred during the past three years. The “intentionality” of the efforts was how many staff members described the change. The role administrators play in the process is an aspect of this intentional effort. As one administrator indicated, “I think it is that opportunity as a lay person to
really have an impact across all lines on campus to maintain the history, tradition, and culture of this institution in an absolutely intentional way.” He went on to express how “his highest priority … [is] how to create an environment, an intentional culture … that reflects the Jesuit values of how we go about our business every day.”

Two factors are clearly understood as driving forces behind the sudden influx of socialization activities: the naming of a lay president and his subsequent naming of a Director of Mission and Identity. Dr. Fred Pestello started as president of Le Moyne College in 2008, becoming the first permanent lay president at the institution. Hiring a lay president was a significant change for Le Moyne. As one administrator indicated:

I do know that when we hired the first lay president here that there was concern from folks who really recalled the history and tradition of this place with Jesuits in robe walking campus and living in dorms and doing a lot of those other things.

The need to ensure commitment to the institution’s Jesuit identity was not lost on the administrative staff members. As one administrator described, “Even though we don’t have a Jesuit president, we still are Jesuit; we’re still in the Jesuit tradition; these are the things that we’re doing.” The significance of his status as the first lay president does not seem to be lost on President Pestello either. He quickly implemented the OneLeMoyne process, which sets as the top priority to “fully and energetically express the College’s Catholic and Jesuit mission, identity, and character” (Le Moyne College, 2011, p. 2). Concerns that may have existed as to how the Jesuit nature of the institution would remain without a Jesuit president appear to have been unfounded. As one administrator expressed:

I’ll be honest with you … I am seeing more about the Jesuit mission here with a lay president and a Director of Mission and Identity who is given the authority, the influence to touch us on campus. More than I saw when I first came when we had a Jesuit priest who was president … This is intentional now.
Based on comments from Le Moyne employees, it is difficult to overemphasize the importance of President Pestello’s naming of David McCallum, S.J., as Director of Mission and Identity. Not only did the president make a clear indication of the importance of the College’s Jesuit identity by naming a Director, he also selected an individual who has instilled a passion for the Jesuit mission across campus. It was not unusual to hear comments such as:

The dude is off the charts, how busy he is and what he gets done. He’s the most beloved guy on our campus. He’s just so committed. Since he’s been here, there has been a real emphasis on programming across all lines to develop this ideal that lay people are going to have to carry the torch.

Administrators see the importance of having someone at the institution committed to helping the staff members understand and embrace the nature of the institution’s Jesuit identity. As one administrator described quite simply, “someone who has the power to talk about mission and identity.” And Fr. McCallum’s efforts are not seen as limited to the campus, with administrators referencing his busy schedule, his international travel, and his appearance in Le Moyne television commercials.

**Focused Efforts**

Le Moyne’s emphasis on providing activities to help socialize staff members in understanding and appreciating the college’s Jesuit identity was a common theme throughout the interviews, with all administrators either having taken part in activities or able to identify activities occurring on campus. The entire OneLeMoyne process served as a catalyzing force to bring the institution’s Jesuit roots to the forefront and to engage the community in discussions about the importance of the Jesuit identity. The OneLeMoyne strategic plan serves as a foundation for integrating ongoing discussion into all aspects of the institution’s activities, as described by many staff members through examples of OneLeMoyne and its goals being integrated into staff meetings, retreats, performance assessments, and other activities.
Le Moyne also utilizes its relationship with the AJCU to build upon efforts within the association to benefit the Le Moyne College community. For example, the publication of *The Le Moyne College Green Book*, commonly referred to as *The Green Book* and modeled after Boston College’s *Red Book*, and its distribution to every member of the Le Moyne College community, raised awareness of the institution’s Jesuit identity. As one administrator described, “It provided a tremendous amount of just general background in a relatively concise accessible way to understand some of the things that I’d been hearing about but for which there had never really been any synthesis.” And while not every administrator had read the book, they know it is there as a resource for them: “I know I can read about [Jesuit history] in front of the little Green Book that they give out.”

The AJCU’s signature programs – the Seminar on Higher Education Leadership and the Ignatian Colleagues Program – are also key socializing activities for Le Moyne. The Leadership Seminar, a weeklong event started in 2003, was established to meet the following objectives:

- To develop an understanding of the relationship among mission, identity, institutional leadership, strategy and decision-making
- To foster an understanding of management and other disciplines such as finance and organizational theory
- To enhance leadership abilities through the understanding and the practice of leadership
- To advance knowledge of educational policy issues within the academy and in the broader national environment. (Association of Jesuit Colleges and Universities, 2012h, para. 5)

The curriculum of the seminar focuses on mission and strategic planning, leadership, financial management, fundraising, and student development, all with a specific concentration of what makes these various areas unique at a Jesuit institution (Association of Jesuit Colleges and Universities, 2012h). The Ignatian Colleagues Program, started in 2009, is designed ‘to educate and form administrators more deeply in the Jesuit tradition of higher education so they may
better articulate, adapt, and advance Ignatian mission on their campuses” (Ignatian Colleagues Program, 2012a, para. 1). This program evolved from one specific question: “Where do we go beyond where we are now in the development of lay leadership?” (Ignatian Colleagues Program, 2012b, para. 2). The goals of the program are achieved through an eighteen-month experience combining a three-day orientation, on-line learning, campus-based spiritual exercises, an international immersion experience, and a three-day capstone. To date, over 500 individuals have participated in these programs (Ignatian Colleagues Program, 2012b; Jacobson, 2011). Each of the three Le Moyne administrators interviewed who had attended one of these programs indicated how fulfilling the programs were in helping them engage with the college’s Jesuit identity at a deeper and more formative level.

Le Moyne has also placed a focused effort on reviving common traditions on Jesuit campuses, such as the Mass of the Holy Spirit. This Mass is a common celebration of the start of the academic year at Jesuit educational institutions. One administrator expressed her pleasure in seeing the recent revitalization of the event:

This year it was really nice because Father Bucki, who is the new rector, really I think tried to bring it back to what it used to … it used to be much more involved. More of the students would come to this mass. It’s been kind of dwindling and dwindling.

Having had the opportunity to observe Le Moyne’s Mass of the Holy Spirit during the course of the research, the college has revived this to a level where the chapel was over-flowing. Community members stood in the back, in the doorways, and out in the halls in order to be part of the event.

Le Moyne also provides activities to engage staff members in developing their knowledge of Le Moyne’s Jesuit roots. The Mission & Identity Orientation provides an opportunity for new staff members to discuss core elements of Le Moyne’s Jesuit identity (e.g.
cura personalis and magis) with senior leaders and to receive short lessons in the history of Le Moyne College, the AJCU, Ignatius of Loyola, the Society of Jesus, Simon Le Moyne, OneLeMoyne, and the relationship of the Catholic Church to Jesuit institutions. This half-day experience goes beyond a lecture and provides participants an opportunity to engage in discussions and reflect on how the Jesuit identity of the institution impacts them.

A final activity frequently mentioned was the Jesuit Leadership Forum, now in its third year. The forums provide an opportunity for members of the community to spend an academic year meeting monthly in small groups (faculty, administrators, or support staff). As described by those who participated, the forums are a combination book club, support group, and leadership seminar, providing participants an opportunity to more fully develop their understanding of leadership and Jesuit ideals. Those who participated spoke of the forums very highly. Although a few admitted having to be coaxed into participating, in the end, they were very glad for the encouragement to take part.

Acknowledging the Importance

A colleague of mine has long been fond of expressing the need to get things “into the water” to help organizations embrace the importance of a particular effort. In conducting these interviews, there was definitely a sense that the Jesuit identity of Le Moyne is “in the water.” Focused efforts to engage staff members in the discussion of the institution’s Jesuit identity go beyond formal programming and have become part of the day-to-day experiences of the staff members. There were many references to ongoing discussions, whether with colleagues, in staff meetings, with supervisors, or in venues beyond those specifically developed by the Director of Mission and Identity. Overall, staff members seem to understand and acknowledge the
importance of Le Moyne’s Jesuit identity. Even more so, they understand the need to keep that identity at the forefront of the institution’s activities. As one administrator expressed:

I’ve been here a little over 12 years now. It’s only been within the past four or five years, and increasingly in the last couple years, where the college has made a concerted effort – it’s part of the strategic plan – to really build and enhance both Catholic and Jesuit identity.

Another administrator, when asked what kind of images the term “Jesuit identity” conjures in relation to Le Moyne College, replied, “For me, personally, it directs me right to our mission, and we’ve done a lot on this campus to bring us towards our mission.” Throughout our interview, this administrator consistently referenced back to the core elements of the Jesuit identity that are part of Le Moyne’s mission.

Another demonstration of staff awareness of the importance of these activities came when one staff member indicated her feelings regarding those who do not participate. She expressed that she believed the other staff members are missing out when they do not take part in the focused efforts occurring on campus to enhance Le Moyne’s Jesuit identity:

I don’t know that everybody takes advantage of it or realizes that it really does help you become … to feel better about the institution itself. Some people are like … I don’t have time, I gotta go home … And I think they’re missing out. I really do.

This idea of non-participation is important to acknowledge in describing the Le Moyne College community. While the administrative staff members interviewed were all aware of the college’s Jesuit identity, the programming efforts occurring to build awareness, and the core elements of the Society of Jesus, this awareness did not always translate to active participation in socialization activities on campus. As one administrator coaxed into attending the Leadership Forum (and who appreciated the coaxing) indicated:

I have people here [who say] ‘I would never do that in a million years.’ And it’s not for everyone. You can’t make it for everyone. I mean, I think people live with those ideals
and [thus] don’t want to participate in that. I was one of the ones that … I was one of those non-believers.

The few administrators who indicated they were not engaged in socialization activities all referenced their own time limitations, usually due to other personal commitments. In only one case did an individual express active efforts to avoid participating in socialization activities. This same person was also very knowledgeable of the history of the Jesuits through earlier education and was easily able to relate her daily efforts to the OneLeMoyne goals. Her avoidance seemed less about a lack of interest in the college’s Jesuit mission and more about a desire not to be involved in group activities.

OneLeMoyne

Le Moyne’s recent strategic planning process was a unique element contributing to its selection as the case study site. Understanding Le Moyne College requires an awareness of OneLeMoyne, the institution’s strategic plan, not only in relation to its goals, but also in relation to how the plan came to be. More than just a planning document, OneLeMoyne has become a symbol of the college, serving as a lens for staff members to view their own individual activities and the institution’s accomplishments. Allaire and Firsirotu described how “past and present leadership create and sustain systems of symbols which serve to interpret and give meaning to members’ subjective experience and individual actions” (1984, p. 221). OneLeMoyne serves as an example of how the current leader of Le Moyne has created a symbol to help provide meaning for staff members. Developed over a two and a half year period, the centerpiece of the project is the OneLeMoyne Vision: “to be a premier Jesuit college where diverse talents meet to foster academic excellence, integrity, and a commitment to justice” (Le Moyne College, 2011). The entire process served as a socializing activity for the campus.
Planning and Implementation

Introduced in 2008 in his first convocation speech as president of the college, President Pestello laid the groundwork for the strategic planning by asking, quite clearly, “what must Le Moyne College become” (Pestello, 2008, p. 1). These five words set the stage not just for the change that comes with developing a strategic plan, but also for developing the approach that Le Moyne would take in determining how to propel itself forward. President Pestello asked this question not just of his senior staff or of the faculty, but of the entire Le Moyne community. His goal was to engage the Le Moyne community in discussions that would establish the institution’s specific goals. As Burton Clark stated, “a symptom of a powerful saga is a feeling that there are really two worlds – the small blessed one of the lucky few and the large routine one of the rest” (Clark, 1971, p. 511). President Pestello brought that feeling of the “lucky few” to light in his statement, “OneLeMoyne – its success or failure – rests with all of us who are fortunate to be members of the Le Moyne College community” (Pestello, 2008, p. 3).

President Pestello went on to emphasize the “dynamic” aspect that “everyone must and will have the opportunity to contribute, to feel valued, and to be heard” (Pestello, 2008, p. 5). In saying this, he was not simply establishing the opportunity for people to contribute. Here he pulled from a core Ignatian value – *cura personalis*, or “care of the whole person” – to create the opportunity for people to feel cared for at all levels. It was not just that Le Moyne College employees could contribute, but they would be heard and would be valued. The phrase, “an educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development,” from the descriptive statement developed in Chapter Four, was inspired by this concept of *cura personalis*. The
President’s speech demonstrates the focus on meeting an individual’s full needs extends not just to students, but also to all members of the Le Moyne community.

President Pestello returned to OneLeMoyne in subsequent convocation speeches, while also acknowledging the need for change and the difficulty change may bring.

As a sociologist and one who has led large and complex organizations, I understand that change is often difficult and sometimes feared. But it is also – and I stress this – inevitable. It is part of the human condition. Indeed, change is already upon us. We must rise to its challenges and find opportunities within them. (Pestello, 2009, p. 6)

The descriptive statement from Chapter Four includes the phrase, “an educational environment … that empowers administrative staff to identify and act on opportunities for change,” to specifically acknowledge the Jesuit penchant for change.

By the fall of 2009, the Le Moyne community had nominated their peers to the planning committee and the committee had prepared draft documents of the OneLeMoyne vision and its six core objectives. These documents were made available to all staff for further feedback. By the fall of 2010, participation had grown to nearly 90 members of the faculty, staff, and administration working in teams focused on the six objectives to develop a strategic implementation plan (Pestello, 2010). To expand participation even further, all members of the Le Moyne community were invited to contribute through the OneLeMoyne Collaborative Workspace. This website provided a central location to post meeting minutes and draft documents, seek input, and generally engage the community in the OneLeMoyne process. While the primary focus of document analysis for this research was publicly available documents, the collaborative workspace had already been updated to reflect the final outcomes and thus no longer contained the public information from the strategic development process. However, the strategic planning implementation leader provided a variety of materials about the process, and it is interesting to note comments made in the minutes of a September 2010 meeting of the
committee co-chairs and vice presidents (presumably made public on the collaborative workspace). “The Magis, the spirit of excellence that stems from a sense of gratitude and a desire to go beyond the status quo (for the greater glory of God) appears to be catching on as the inspiration for OneLeMoyne.” The phrase, “an educational environment … that continuously supports and encourages the question “what’s the best thing I can to do help someone at the deepest, most important level,” from Chapter Four’s descriptive statement, was inspired by this concept of magis.

**Strategic Priorities**

By the spring of 2011, the *OneLeMoyne Mission, Vision and Strategic Plan* was in place. The plan provides six institutional strategic priorities, which serve to guide decision-making at all levels.

In support of its mission and the OneLeMoyne vision, Le Moyne College is committed to the following strategic priorities:

1. Fully and energetically express the College’s Catholic and Jesuit mission, identity and character;
2. Vigorously pursue academic excellence across all programs;
3. Create organizational excellence in resource stewardship and professional practices throughout the College;
4. Maintain an intellectually, socially and spiritually vibrant College community;
5. Promote greater diversity within the Le Moyne community and increased engagement between the College and other communities regionally, nationally and internationally;
6. Achieve a national reputation for excellence in Jesuit education. (Le Moyne College, 2011, p. 2)

Awareness of the OneLeMoyne strategic plan and its six priorities was clearly evident in the interviews of the administrative staff members. Most of the staff members interviewed referred directly to the strategic plan by name, while others provided examples of activities occurring to further this vision for the institution. As one administrative staff member indicated:

The way we expect it to work, it should be something we think about. Do I think about it every day? Of course not, but I do consider it, and I think how does what I do help one
of those visions? … If I can’t get an answer, I think about it a little bit. … It’s just an exercise to make me aware of how what I do makes Le Moyne a better place, not only to work, but more importantly for our students.

Another indicated, “We’re constantly talking about how is what we’re doing as a staff member … connecting back to that OneLeMoyne vision, connecting that back to our Jesuit tradition.”

While another acknowledged the broad-based community involvement in implementing the plan:

Every department in every division … we all had meetings and round tables where we had to go through each of these tenets and decide what does it mean to be Jesuit? What are the things and how are we going to put that into play when we do our job?

In addition to the general awareness of OneLeMoyne, staff members provided examples of campus activities that help achieve OneLeMoyne goals, such as the annual Mass of the Holy Spirit to celebrate the start of the academic year, and how it energetically expresses the College’s Catholic and Jesuit identity (Strategic Priority #1). Others provided examples of how they relate their work to strategic priorities. For example, one staff member discussed how her leadership role in a national organization helps further the goal of achieving a national reputation for excellence (Strategic Priority #6). Another staff member spoke of programs to engage Syracuse city high school students with the college and the resulting effect of promoting greater diversity and increasing engagement between the College and other communities (Strategic Priority #5). Interestingly, there was one staff member who was very willing to participate in the interview process, though was insistent she would not have anything to contribute. Despite this insistence, she easily identified the centrality of OneLeMoyne and her ability to relate her daily work to its six tenets.

OneLeMoyne is a core element of this institution. As one administrative staff member indicated, “I would be shocked if you met an employee on this campus who did not know about the OneLeMoyne vision.” Even more importantly, staff members know the OneLeMoyne
strategic plan is not a document in a drawer somewhere that is only occasionally dusted off for review. They are able to identify the importance of the strategic plan in relation to both their own and their institution’s performance, especially in relation to the institution’s Jesuit identity. The OneLeMoyne plan and the manner in which it was developed and implemented demonstrate the concepts of *cura personalis*, change, and *magis* that serve to articulate the Jesuit mission.

**Identifying the Jesuit Saga: Core Elements**

Culture is the fabric of meaning in terms of which human beings interpret their experience and guide their action. It is an ordered system of shared and public symbols and meanings which give shape, direction and particularity to human experience. Culture should not be looked for in people’s heads but in the ‘meanings’ shared by interacting social actors. The analysis of culture therefore is not an experimental science in search of laws but an interpretive one in search of meaning. (Allaire & Firsirotu, 1984, p. 221)

In Chapter Four, the elements of *cura personalis*, change, and *magis* stood out as core elements of the Society of Jesus based on a literature review and discussions with Jesuits residing at Le Moyne College. These three elements were used to develop the descriptive statement of the Jesuit saga: an educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help someone at the deepest, most important level.” The final research question focuses on staff members’ awareness of the elements in the Jesuit saga. Allaire and Firsirotu emphasize the ‘meanings’ shared by the members of a group, and the OneLeMoyne plan provided an initial demonstration of the shared meaning of the core elements of *cura personalis*, change, and *magis*. Looking at the individual discussions with administrative staff members provides a further demonstration of this shared view.
**Cura Personalis**

Captured in the descriptive statement through the phrase, “encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development,” *cura personalis* is clearly inter-woven into the fabric of Le Moyne College. As one staff member indicated, “Always *cura personalis*. I mean that’s the first one that pops out of everyone’s mouth.” Whether referenced as the Latin phrase or an English translation, such as “care of the whole person,” this was, in fact, the most common of the three core elements mentioned across the case study research. It was observed in events, read in documents, and mentioned in interviews with administrative staff members. In fact, it was often the very first example provided by staff members when asked about the Jesuit identity and common phrases used on campus. Examples of how *cura personalis* relates to the college included interactions with students, interactions with colleagues, and even more formal activities, such as interactions with Human Resources. As one administrator described the general feeling: “The concept of *cura personalis*, that desire and move to action to actually take care of others.”

In discussing *cura personalis*, there was a clear emphasis that caring for others is not just about making someone feel good for the sake of feeling good. Caring for others is about a much deeper effort to listen and understand where a person is in order to help them in their need. The descriptive statement from Chapter Four captures this in the phrase, “based on his/her individual state of growth and development.” Employees at Le Moyne captured this in phrases such as “figuring out what they can do to care for themselves right then and now,” and “you have to find out where the students are at, and you have to ask them what do you hope to get out of this experience.” In reflecting on interactions with colleagues, one administrator described it this way:
It’s about meeting them … beginning where they are and listening, and I think that’s very much part of the Jesuit tradition, as well … listening. It’s not me giving them a mandate. So I’m seeing how I can help them. That’s what I really enjoy in my day-to-day life.

Staff members went on to emphasize that *cura personalis* is not just praise, but also difficult conversations. This was heard both at the observations of campus events, such as the Mission and Identity Orientation, as well as in specific interviews:

I feel that I have learned that *cura personalis* means to not just pat someone on the back who’s doing well. *Cura personalis* is that tough conversation I have to have with a student that may have to look at what’s happening outside the classroom, get some help, because they’re not going to succeed otherwise … Caring for the whole person, even when it hurts to talk about it. Some people in secular life would call it tough love, but I would say that that is where it intersects with the Jesuit mission.

On a very practical level, several staff members related the concept of *cura personalis* to the care they feel they receive from the institution’s Human Resources activities. Specific examples given related to wellness, sick leave, and weight management, and in each case, the individual expressed their appreciation of an institution so focused on the care of its employees. The administrative staff members at Le Moyne are clearly aware of the role *cura personalis* plays in the institution’s efforts to achieve its Jesuit mission.

*Magis*

In addition to their awareness of *cura personalis*, employees were also clearly familiar with the Latin term *magis*. Expressed in Chapter Four’s descriptive statement as “continuously supports and encourages the question ‘what’s the best thing I can do to help someone at the deepest, most important level,’” *magis* was mentioned almost as frequently as *cura personalis*. Employees captured *magis* in both its Latin form and in phrases such as “striving for more,” “striving for excellence” or “excellence in education.” One staff member described it this way: “With us working here, just keeping the concept of *magis* and doing more. How can we do
things better? How can we think ahead and think about how we can push further instead of just doing what’s needed?”

Reflecting back on the Jesuit interviews completed in an earlier phase of this research, one interviewee described *magis* with the acknowledgement, “You only have so much time, so much talent, so many abilities; you can’t do everything, so what’s the *magis*? What’s the most you can do with the time, the resources you have available?” *Magis* is not simply a quantitative concept of more. *Magis* reflects a qualitative concept of doing the best with what you are given. As one administrator expressed about his skills:

I am grateful and appreciative that I do have [this skill] … It’s not mine, it was given to me as a gift … and I want to try and use it in a way that will make who gave it to me happy they gave it to me.

This particular individual, who emphasized the fact that he does not practice a religion, is committed to contributing to the Le Moyne community by making the most of his gifts.

The annual *Magis* Awards demonstrate a clear symbol of this, by recognizing the “spirit of excellence.” “The purpose of the award is to acknowledge an employee’s pursuit of excellence throughout the year.” Criteria include, “excellent performance beyond normal duties; excellent service to the Le Moyne Community; excellent leadership and teamwork; and extraordinary professional contributions” (Le Moyne College, n.d.-c). The institution’s vision “to be a premier Jesuit institution” and the institution’s goal to be a nationally premier Division II athletic program reflect other symbols of *magis*.

*Curá personalis* and *magis* were often referred to as inter-twined concepts. Relating these specifically to the field of higher education, *magis* represents challenge, while *cura personalis* represents support, which are both aspects of student development theory. In one of
the interviews, after listening to a staff member describe a variety of concepts and provide multiple examples, I summarized the information provided by saying:

The reason I am smiling so much as you answer is it’s the first time I’ve heard it worded in a way that clicked for me as how much it relates to student development theory. I go right back to Sanford’s challenge and support, and you were challenging them to grow from where they are but providing them the support to make sure that they can do it.

This idea of challenge and support was discussed in the Mission and Identity Orientation, as well as in multiple individual interviews. *Cura personalis* and *magis* are not only the two most well known phrases on campus, but they are also intricately linked.

**Change**

Unlike *cura personalis* and *magis*, the concept of change – the third element of the descriptive statement – received few direct references in the interviews with administrative staff members. This aspect of the descriptive statement – “that empowers administrative staff to identify and act on opportunities for change” – did not appear to stand independently in the experiences of those interviewed. Although no individual specifically referenced change as a common phrase or related it to the Jesuit identity, the idea of change was closely linked to *magis* in the interviews, observations, and document review.

Looking at the *Magis* Awards referenced earlier, the criteria for “excellent leadership and teamwork” includes the element, “strongly advocates and promotes change when it is important to do so.” Also referenced earlier, President Pestello’s commencement speeches emphasized the need for the institution to undergo change, acknowledging the challenges that come with change and often providing specific examples of where change needed to occur, such as the core curriculum, personnel and compensation practices, and facilities (Pestello, 2009). Administrators provided examples of the changes occurring in learning communities, orientation
activities, athletics, and student activities programming, though always in the context of *magis* and the goal of improving and achieving more.

**Additional Core Elements**

In analyzing the interviews with administrative staff members, it became clear there were additional themes not included in the descriptive statement from Chapter Four. Some elements identified in the literature or interviews with Jesuits, such as “finding God in all things” and “faith and reason,” were rarely referenced by administrative staff members. Another element, social justice, was mentioned several times, however, this element was purposefully left out of the descriptive statement of the Jesuit saga. The descriptive statement focused on elements dating back to the founding of the Society, and “social justice” is a term that did not gain wide prominence until the mid-20th century. Two additional elements so consistently referenced across the interviews deserve a further look: reflection and inclusiveness.

**Reflection.** The concept of reflection can be traced back to the founding of the Society. The *examen* is a Jesuit practice of taking time each day to reflect on the events that have occurred and to think about both the successes and the opportunities for improvement. It is a powerful self-reflective habit creating a on-going feedback loop for the individual and his efforts to achieve his goals (Lowney, 2003, p. 125). Some administrative staff members referred directly to the *examen* ritual and their own efforts to integrate it into their lives, while other staff members focused on the overall concept of reflection and the opportunities it provides. Descriptions of the idea included phrases such as “being thoughtful about it and being reflective about it,” “something reflective of how we can improve our own personal growth,” “deep, contemplative thought,” and how the “whole reflection piece was truly unique.” One staff member described it this way:
One of the teachings is to take the time out each day to stop and reflect on how you’re day is going, what could you change, what’s going well, what’s not going well? How can you maybe look at it a little differently? I do try to stop and think. Maybe not every day but …

A specific example of the integration of this into campus activities is opening meetings or classes with a reflection, which was often a quote or a reading for participants to consider.

Along with reflection comes the idea of discernment. While reflection represents taking the time for “deep, contemplative thought,” discernment is taking that reflection and applying it to the decision-making process. As one administrator explained:

It’s one of the core aspects as a Jesuit institution. We try to differentiate ourselves in teaching people not to make snap judgments but to explore, to meditate on things, to think very critically about decisions, and teaching it as a life skill as much as a spiritual exercise. Something to help an individual throughout their life make guided decisions, informed decisions based on a deep heart-felt and informed thought process.

In considering the concepts of reflection and discernment, like many Jesuit ideals, these concepts are not limited specifically to religious spirituality. In fact, more than once, an administrator pointed out reflection is not simply about praying. Reflection and discernment pull from a tradition going back to the very beginnings of the Society of Jesus, and serve as elements that allow administrators to relate in a deep and meaningful way to the Society, even in their status as lay administrators.

**Inclusiveness.** Of all the concepts that arose during the research, the inclusive spirit of the Jesuits was the one item mentioned by every administrative staff member interviewed. This inclusive feeling was expressed in a number of ways, ranging from the idea of a catholic approach (with staff members specifically clarifying catholic with a small “c”), to an accepting and supportive environment, to an openness that allows staff to feel comfortable thinking about, discussing, and practicing their beliefs, regardless of their spiritual background. The importance
of supporting students of all faiths, and acknowledging that it takes staff of all faiths to keep the institution running, was a common message. As one Catholic administrator indicated:

In my thinking, when I hear Jesuit, I hear it in the word … some others may not, but I hear it in the word catholic with a small c. Proud of our identity, talking about our identity, but embracing other faiths and other beliefs.

A non-Catholic administrator discussed her feelings in the Catholic, Jesuit environment:

I definitely never feel excluded or anything. I always feel welcomed whenever we’re participating in a mass or an activity that might be a little more spiritual than normal. I never feel uncomfortable or anything like that, so I think it’s very open.

Another administrator expanded on this, indicating:

I’m not Catholic, but I have gone to some of the masses, and they’re very inclusive. It’s not just like a Catholic mass. It’s a very open service. I know that the people on campus ministry are always very aware of keeping … making sure all people with different religious faiths are included and have their own opportunities.

In addition to the specific references to religious faiths, staff members also made a point of emphasizing the campus’s inclusive nature in other areas of diversity, such as race and sexual orientation. The very first comment made in the entire administrative staff member interview process nicely summarizes the views continuously mentioned:

I think the first image for me is one of Catholicity, as well. That we strive to tie those terms together [Jesuit and Catholicity], yet in a highly inclusive, socially diverse community. That there is a values-based identity based on Ignatian spirituality and Catholicity that blends here on campus.

_Cura personalis_, change, and _magis_ are core elements of the Society of Jesus, based on literature and interviews, and were integrated into the descriptive statement of the Jesuit saga. In analyzing the interviews and observations, all three elements were consistently referenced, though _cura personalis_ and _magis_ were referenced more often and more directly than change. While Ignatius’ idea of “living with one foot raised” embodies a society ready for change, it is easy to see how, in both the literature and the interviews, the changes that occur are a result of
efforts to achieve *magis*. The elements of reflection and inclusiveness, which did not emerge from the literature and Jesuit interviews in the initial analysis to the degree the other three elements did, seem to be critical elements in the eyes of the administrative staff members.

**Cultural Awareness**

When actions are required, people sharing culture will know what to expect from one another – even if they have not seen one another before. (Van Maanan, 1984, p. 243)

Considering Van Maanan’s assertion, Le Moyne’s culture can be viewed through the consistency of action amongst the employees. This consistency relates to the final research question: in what ways are administrative staff members able to identify the Jesuit saga in relationship to their responsibilities and daily activities. In reviewing the core elements from the descriptive statement, a common understanding of the Jesuit identity was demonstrated through the interview process. For some, participation in socialization activities at the college provided the opportunity to learn about the Jesuit saga. Others brought knowledge with them, having developed an understanding of the Jesuits through educational activities, whether as alumni of Le Moyne, through graduate work at Jesuit institutions, or even learning about the Jesuits as far back as elementary school (though, interestingly, not at a religious school). Some simply connect the Jesuit goals of the institution to their day-to-day responsibilities, such as analyzing data and completing reports, scheduling classes, purchasing library books, and working with students.

Administrators have also discovered the institution’s Jesuit identity is something that aligns with their own personal beliefs. Multiple staff members commented that they did not know much about the Jesuits upon starting at the institution, but that, after learning about the Jesuit identity, they felt very strongly about how it aligned with their own belief system. These staff members spoke of their admiration of the work the Jesuits have done over the past five
centuries, whether in the realm of exploration, education, serving the poor, or other elements. They also spoke of the Jesuit practice of reflection and how it aligned with their approach to life. And they spoke of how working in the Jesuit environment is something that simply makes them feel good.

Interestingly, many individuals interviewed made a specific effort to clarify that they were not as knowledgeable as they thought they should be or that they felt that they were just beginning to learn what they needed to know. They often indicated they felt there were others on campus who could answer their questions more effectively, and almost all of them deferred to Fr. McCallum as the expert when it comes to the topic at hand. Also interesting was that some of these individuals had gone through lengthy socialization activities far beyond attending the Mission & Identity Orientation or reading The Green Book. While the knowledge of the Jesuit identity and the Le Moyne culture exists within these individuals, their confidence in their knowledge is still developing.

In addition to understanding the Jesuit identity, there was also an awareness of the challenges facing Le Moyne and Jesuit institutions as a whole. Individuals interviewed referenced the difficult economic times facing all schools and acknowledged Le Moyne has not been spared these difficulties. As one individual indicated, “We have a lot of challenges, a lot of competition. Our students are not wealthy. We worry about the numbers. We worry about revenue.” Another indicated, “There’s a lot of upheaval right now.” And another indicated, “There’s been a lot of cut-backs, and people are pushed to their limits.” At the same time, these same individuals all expressed very positive feelings toward the institution. As one of them stated, “I still see people really in there and willing to go that extra mile, even though they’re pushed to the brink of what they can handle … which is nice.”
Individuals are also very aware of the declining Jesuit population and the role lay staff will need to play in the future of Jesuit institutions, as was demonstrated in observations, documents, and interviews. In observing a lecture on Le Moyne’s campus by Howard Gray, S.J., who was visiting the campus as part of the “Faith That Does Justice” series, an audience member specifically asked Fr. Gray to share his views on the future of Jesuit education in light of the decline in Jesuit vocations. Additionally, in The Green Book, the authors acknowledge “most of the Le Moyne College faculty, administration, and staff are not Jesuits,” (Le Moyne College Office of Mission and Identity, 2012, p. vi) and go on to state “there are also many challenges to sustaining Jesuit values and principles in education, not the least of which is a dramatic decrease over the years in the number of Jesuits available to teach” (Le Moyne College Office of Mission and Identity, 2012, p. 16). And, as one individual expressed:

I think there is a reality here that’s understood that the Jesuit population is declining and declining rapidly. And there is a buzz on this campus about the need for many of us to develop in … the role of creating a relationship with those [Ignatian] values and the people we work with.

In talking about the need for lay staff involvement, another individual expressed, “That’s kind of the idea, isn’t it, that we’re [lay staff] supposed to be down here with those ideals and kind of interacting with our people.” These staff members were also very aware that carrying on the Jesuit identity does not require lay staff members be Catholic. Many administrators indicated they are not of the Catholic faith, while others emphasized being Catholic is not a requirement: “I mean people who think you have to be Catholic to work here or teach here, I mean that’s just not the way it is.”

**Demonstrated Behaviors**

While there appears to be a common understanding, is there also a common demonstration of that understanding? Coming back to Van Maanen’s statement, what do the Le
Moyne staff members expect of each other when action is required? Across the board, the administrative staff members talked about a culture of caring and compassion. As one individual indicated, “I think for me [care for each other and for the students is] a consistent theme and is one that has been pervasive from the first day I set foot on this campus.” There is clearly an expectation of respect and courtesy. Over and over, behaviors as simple as holding the door, acknowledging each other, and being acknowledged by students on campus were mentioned; as were activities such as meeting each other’s eyes and saying a simple “hello,” or respecting the balance between a student’s academic and extracurricular endeavors. As one individual indicated about his previous place of employment, “In thirteen years, I never passed a student who nodded, smiled, and said hi to me like we do here.”

Examples of a deeper level of caring were also shared freely in the various interviews. One individual appreciated the fact that every day her supervisor made sure to ask her how she was doing. This individual emphasized that her supervisor was expressing a true care in wanting to know how she was doing as a person: “It’s not ‘how are you doing with your work?’ It’s ‘how are you as a person?’” Another individual mentioned the Dolphins Care program, where administrators knock on each first-year student’s door, give them a cookie, and, more importantly, ask how they are doing. As this individual expressed, “It’s right around midterms; they’re all sweating. It’s the idea that you’re not alone; you do belong. If you’re having trouble, come see us.” There is also an expectation that everything that can be done will be done to help those in need. Multiple examples were provided of how administrators expect each other to take a “drop everything” approach to help a student in need.

Collaboration was also a key element identified as an expectation of their colleagues. “Everybody works together. Everybody has the feeling of how they can help one another, and
help our students, and that’s all part of the feeling. … I reach out to other offices, and they reach back here.” One individual summed up the focus on caring for students by saying, “There is a level of attention and care and involvement with both the faculty and the administration for the students, in support of the students, in their lives and in their interests that is very rare.” While another was able to express how that caring manner applies to colleagues as well as students. “I just feel like if somebody feels that they’re in a place where they’re loved and appreciated … I think that, in general, makes people want to go further for that place or people in life.”

**Underlying Jesuit Culture**

Some people might think it’s just because it’s a small institution. Some people may think it’s just because a lot of people stay here years and years, and we know each other. But there’s something underneath that keeps welling up that says, ‘This is what we’ve got to do, we’ve got to go a little bit further.’

When one of the administrators expressed the sentiment above, the idea of “something underneath” put words to a recurring theme across the interviews. Administrative staff members often spoke of the Jesuit identity and the core elements of the Society in an indirect manner. Sometimes they were clearly aware of the indirect references when specific “Jesuit” words were not used. For example:

I think the two big [phrases] are *magis* and *cura personalis*. Sometimes they don’t actually say those two phrases, but they’ll say ‘care of the whole student’ or ‘striving for more,’ ‘striving for excellence in all aspects’ … I know the background of it is getting back into these key Jesuit themes.

Other times, it was difficult for them to explain it, but they knew there was an alignment between what they were experiencing and the Jesuit identity. For example:

The only way I can answer those [questions] is by saying what I just said a little while ago. It’s just that my philosophies, again, dovetail with everything I hear. It’s something more than that. It’s the creation – and I didn’t create it, they did – it’s the environment. It’s the culture that makes me more open about it. By making me more open about it, I think more about it.
And other times, they were pretty sure the Jesuit identity played a role, but they just weren’t positive:

The other thing that makes us different, I believe, and I honestly can’t tell you if that is because of the Jesuit influence or because of our organizational structure, or maybe it’s a little bit of both. While every institution has bureaucracy, we get more things done informally here than through channels. It’s fairly easy to collaborate.

There is an underlying feeling that people at the college are just beginning to understand how the Jesuit identity relates to the culture experienced on a daily basis. As one administrator explained:

It’s cliché, but the concept of care and caring for individuals is something that has always been talked about. I don’t know that people on a daily basis necessarily equate that to the Jesuit tradition, but it certainly is very consistent with that.

The same administrator went on to explain:

I don’t think a lot of people associated [it] with being Jesuit. But, yes, that very caring nurturing aspect of this community that is, I think, what I consistently hear most people, and myself included, as kind of a hallmark of this institution. It’s only really been recently that I have equated [this] with the Jesuit tradition. I obviously can’t speak for everyone but I suspect that a lot of people are having that same realization. That sense of community, while certainly the fact that you’re small promotes that, there’s also something about the fact that this is a Jesuit institution that necessarily expects that and develops that. I think it’s something that everybody here is very proud of.

While another administrator stated:

So, I think it’s a whole big philosophy as how people come first, and that’s where we’re most interested, and that’s what we try to do most on a daily basis. And I think that everyone here, whether they call it Jesuit or not, I think that is what we do.

Or, put even more succinctly, “Whether you think it is or not, it’s just it is, because that’s what we are.”

The institution’s underlying Jesuit nature is something very important to these employees. Over and over, I heard from those interviewed how comfortable they felt working at the institution and how much they appreciated working with others who shared their view of how
to work toward success. And it is important to note these feelings of gratitude were not limited to Catholic administrators. Administrators of various faiths, and even of no specific faith, expressed this appreciation. One administrator described his growing understanding of the Jesuit identity: “Being thoughtful about it and being reflective about it. It just made a lot of sense as a kind of a way for me to better live my life and a way to proceed each day.” Another administrator described, “I don’t think it’s something you talk about. I think it’s something you live, and that’s what I see here that I’ve never seen before.” While another indicated, “I think if everybody is living some of it [Jesuit values] in their daily lives, then it produces a better atmosphere and a better working place.”

Many of them felt like coming to work at Le Moyne was like “coming home.” Three comments, by three different administrators, provide an idea of the overall feeling of working at Le Moyne:

- “Coming here, it’s almost, and this sounds a little melodramatic, it’s almost like we got to save the best for last.”
- “When I came to Le Moyne, I feel is if I’m home here.”
- “It’s something that for me feels like home … It felt so easy to just step onto campus. I didn’t feel like an outsider. I was sort of welcomed in, and it has sort of a welcoming presence.”

“I’m not a Catholic, so I don’t come from that background, but I think just the whole … when I think of Jesuit, it’s just trying to be a better person.” This administrator summed up what so many other individuals expressed. Whether Catholic or not, they view the Jesuit identity as one rooted in helping individuals be better people and something in which they want to be involved.
Conclusion

In taking a constructivist approach to this research, the meanings individuals develop through their experiences are “not simply imprinted on [the] individuals, but are formed through interaction with others … and through historical and cultural norms that operate in individuals lives” (Creswell, 2009, p. 8). These interactions and norms can be seen in the activities occurring on the Le Moyne College campus and can be heard in the manner in which administrative staff members discuss their experiences at the institutions. As one administrator indicated:

I guess my … answer to your question is you see it in the culture and the day-to-day. I think that’s the key, that’s the difference. That’s what separates Le Moyne from anywhere else I’ve been. You see it every day, and it encourages you in a sense. Not only am I happy to be here, but I am happy about the way it is.

It is clear administrators are able to identify core historical elements of the Society of Jesus. A response such as, “For me, the Jesuit identity is the theme of *cura personalis*, *magis*, and figuring out where students are at when it comes to their faith and what they hope to achieve here at Le Moyne,” was quite common when asking them to discuss the images conjured by the term Jesuit identity. It was also clear there are common expectations administrators have of each other. A culture of caring and inclusiveness permeates the experiences these individuals describe.

Le Moyne has taken specific steps to create opportunities for interaction that nurture this understanding of the institution’s Jesuit identity. A variety of socialization activities exist to engage staff members at their own individual comfort level. General activities, such as the availability of *The Green Book* or the Mission & Identity Orientation provide an introduction to a broad range of Jesuit facts, terminology, history, and meanings. More active engagement occurs through events like the Jesuit Leadership Forums, which pull groups of faculty, administrators, or support staff together on a monthly basis for an exploration of leadership and how it can be
influenced by a Jesuit awareness. And senior leaders can participate in intensive Jesuit formation activities, such as the Association of Jesuit Colleges and University’s weeklong Seminar on Higher Education Leadership or the two-year Ignatian Colleagues Program.

In addition to opportunities for interaction with other administrators on campus, the presence of the members of the Society of Jesus on campus emphasizes the importance of a meaning “formed through interaction with others.” Jesuits serve in roles across the institution, such as the college’s archivist, alumni chaplain, resident chaplain in the residence halls, Director of Mission and Identity, and in traditional faculty roles, among other things. However, the most important interactions the Jesuits have with administrators on campus are less about their formal role and more about simply being colleagues. Consistently, administrators mentioned the opportunity to simply interact with these individuals. The interactions are not focused on specific Jesuit concepts but rather provide an opportunity to experience the lived presence of the Jesuit identity on campus. As one administrator indicated:

I value the interactions and the opportunities I’ve been able to have with them. Again, most of my interactions with them are less around mission/identity and those kind of discussions but more just the human to human, those interpersonal type … certainly having them here on campus and the presence they bring is incredibly meaningful.

Another administrator indicated:

Just having the Jesuits here is a plus because they are Jesuits. They are people that have devoted their lives to service of God, and they have a different take on things. They offer certain things that you're not going to get from the lay audience. The lay audience comes at all things from a different perspective. … The [Jesuits] have in a sense a completely different viewpoint of a particular issue. Now, I might not agree with them on a particular viewpoint, but having that different viewpoint I think is a valuable thing.

Other administrators discussed the opportunities for engaging the Jesuits in the college community, as well as helping students, alumni, and the local community develop a greater knowledge of the contribution the Jesuits make to Le Moyne and the surrounding area.
In addition to the interaction with members of the Society of Jesus, it was clear Ignatius of Loyola, the founder of the Society, is a key figure in the administrators’ understanding of the Jesuit identity. Saint Ignatius was the only member of the Society of Jesus whom the administrators consistently referred to in discussion. (I admit I expected to be told numerous stories of Simon Le Moyne, S.J., the college’s namesake, when, in actuality, his name came up just once during the entire interviewing process.) For some, it was clear from their statements that their knowledge was limited to a basic understanding of the historical significance of his role in founding the Society. For others, they clearly connected Ignatius to their work at the college. One administrator talked about why she uses the life of Ignatius as a focal point of discussions with students:

I talk about Ignatius. He was a businessman; he was clever; he had a transformation that our students can relate to. He had a tough start. Or an interesting start, let's put it that way. … I would say that by talking to the students about Ignatius, they know that they're human and they can get better. They can relate to a guy like that.

Finally, through the OneLeMoyne Vision, Mission, and Strategic Plan, the college has made a concerted effort to ingrain an understanding of the institution’s Jesuit identity and the necessity of engaging identity in the day-to-day considerations occurring in everyone’s role. The President and the Director of Mission and Identity clearly stood out as the thought-leaders in keeping the Jesuit identity at the forefront of campus discussions. And, as the college evolves, staying true to that Jesuit identity is something at least one administrator pointed out as essential to maintaining the culture to which Le Moyne employees have grown accustomed:

I think I can probably say that as we grow as an institution and evolve as an institution one of the areas where people are very fearful [is] somehow that [the caring community] dissipating. I’m not fearful of that because of that fact that I now know that that’s a core part. As long as we’re focused on ‘hey, we are going to adhere to the Jesuit tradition,’ and as long as we’re hiring people who are aligned with that and have that level of spirituality and looking for people who at least in the aggregate have that sense of … and want to work at a place like that.
Le Moyne College is an organization that has clearly taken steps to consciously integrate core Jesuit values into the nature of the institution. In doing so, Le Moyne has utilized the history and saga of the Society of Jesus to provide a foundation for its own success. In speaking with administrators, there were no common manifestations of Le Moyne’s history clearly shared across the campus community other than those tied to the institution’s Jesuit heritage. Thus, while Le Moyne has not built an institutional saga around its own 67-year history, the college has effectively capitalized on the Jesuit saga to create an environment where administrators are not only aware of the institution’s heritage, but also are aware of the expectations created by the existence of that heritage. Administrators at Le Moyne share a sense of ownership in relation to the manifestations of the Jesuit saga and are clearly pleased to work in an environment where they are able to demonstrate *cura personalis* and pursue the *magis*.
CHAPTER 6
CONCLUSION

For almost 500 years, the Society of Jesus has been known for educational excellence. Twenty-eight U.S. Jesuit institutions educate over 200,000 students a year, and maintaining what it means to offer a “Jesuit” education is a factor each of these institutions must address on a daily basis. With the number of active Jesuits in the United States having dropped by over 60% in the past fifty years, these institutions are not able to include large numbers of Jesuits on their faculties and staffs. The reduction in the Jesuit population requires lay staff to actively maintain the institutions’ Jesuit missions, and thus, providing lay staff with a full appreciation of what the Jesuit identity encompasses is key to the success of these schools. Organizational culture provides a foundation for helping staff attain this appreciation, with elements such as organizational saga and socialization serving as building blocks for their knowledge.

Organizational culture is a challenging research agenda given the shear volume of definitions that exist and the host of elements within those definitions. At the heart of culture is the concept of shared understanding of what makes a particular organization unique. The Institutional School, which served as one of the foundations for this research, is a particular anthropologically inspired approach looking at the organization’s history and how symbols develop to help guide the organization (Allaire & Firsotu, 1984). Elements of culture, known as manifestations, are expressed in a variety of manners, ranging from physical representations to verbal stories to behavioral expectations to underlying values. Burton R. Clark introduced one particular manifestation, the organizational “saga,” through his 1970 book, *The Distinctive*
The saga is a way to capture how the impact of a unique accomplishment can serve to guide an organization over an extended period of time. Socialization is how the members learn about the saga (or other manifestations) and their influence on the organization.

In order to study the ideas of organizational saga and socialization within Jesuit institutions, a qualitative case study was undertaken at Le Moyne College. A constructivist approach was utilized in order to investigate the understanding administrators have developed of their work environment, including how interactions and norms influence that development (Creswell, 2009). An emic approach was critical to maintain focus on the views of these administrators rather than on my own beliefs. Spending a considerable amount of time at the case site, utilizing multiple sources of data, and constantly challenging myself to evaluate how my background could influence my interpretations were critical components in contributing to the reliability of the study.

A descriptive statement of the Jesuit “saga” was developed based on a review of Jesuit history, ranging from foundational documents of the Society of Jesus through modern, popular press, and supplemented through interviews with Jesuits at Le Moyne. A case study was then conducted utilizing document analysis, observations, and interviews to determine whether this descriptive statement existed at Le Moyne. The case study materials were analyzed using an inductive and comparative approach (Creswell, 2009; Merriam, 2009) and then utilized to describe the case site with the goal of using rich, thick description to achieve an authentic narrative (Connelly and Clandinin in McMillan & Schumacher, 2006) that would paint a picture recognizable to Le Moyne administrators.
To Help Souls

The review of Jesuit literature demonstrated the phrase “to help souls” as the most commonly expressed ideal in describing the overarching goal of the work of the Society of Jesus. Given the clear place of importance this phrase holds in Jesuit history, “to help souls” was particularly intriguing to me, as a researcher. The phrase was an item members of the Society of Jesus were asked to discuss in their interviews, and early versions of this dissertation used “to help souls” as a working title.

Prying into the meaning behind the phrase “to help souls” uncovered links to other phrases common amongst the Jesuits. “To help souls” is clearly a 16th century phrase for 21st century ideals. Whether through their educational institutions, their missionary work, or other critical elements, helping others is at the core of activities within the Society of Jesus.

Terminology, such as cura personalis (“care of the whole person”) and “men and women for others” (a phrase introduced in the 1970’s by Pedro Aruppe, S.J., the 28th Superior General of the Society of Jesus), captures this need to be engaged in the help and support of individuals.

The Society of Jesus was born out of the desire to help others. Created in the 16th century by eight men who had met while studying at the University of Paris, Ignatius of Loyola served as the catalyst for the group, engaging them in his Spiritual Exercises, developed to help guide individuals toward a closer relationship with God. Approved through a papal bull in 1540, the Society of Jesus (or Jesuits, as they would come to be known) is a unique order. While a monastic society by rule, they have the clear goal of being active in the world and helping others wherever there is a need. Rather than cloistering themselves away from the day-to-day world, the Jesuits are a highly mobile society, ultimately committing themselves to the pope’s directives on where they can best meet the needs of the world. At the heart of the organization is the
concept of *nuestro modo de proceder*, or “our way of proceeding,” which helps every Jesuit stay true to the core elements of the Society, even as they travel the world fulfilling the Society’s mission.

While not a founding element of the Jesuits, the Society quickly became known for their excellence as teachers. Educating their own recruits in the ways of the order soon led to educating them in more general studies, which led to allowing lay individuals to participate in classes, which ultimately led to the founding of the first Jesuit educational institution in 1548, just eight years after the papal bull approving the Society. Their willingness to approach the curriculum as a mechanism for developing new and effective teaching methods earned them a reputation for excellence in education, while maintaining a clear Jesuit, Catholic spirituality in all that they did.

Analyzing the literature, along with the Jesuit interviews, identified *cura personalis*, change, and *magis* as elements serving to embody activities that fostered the Society’s ability to help souls. *Cura personalis*, care of the whole person, centers on meeting the full needs of the individual, including an emphasis on engaging with the individual “where they are.” Change represents the approach that can be seen in the development of the Society of Jesus, whether through St. Ignatius’s admonishment to “live with one foot raised” in order to be ready to serve wherever needed, through their willingness to change the curriculum to meet societal needs identified by the Jesuits, or through their approach to missionary work and their own acculturation into the societies where they served. Finally, *magis* is the idea of “more.” Not a quantitative view of more, but a qualitative approach of identifying how an individual can constantly strive to make the most of what they are given in order to help others. These elements served as the basis for the descriptive statement of the Jesuit saga:
• An educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help someone at the deepest, most important level.”

**Le Moyne College**

Le Moyne College served as the case site for this study. Founded in 1946, it was the 27th of the 28 Jesuit institutions of higher education founded in the United States. It is a small college enrolling around 3,500 undergraduate and graduate students at its 160-acre campus in suburban Syracuse, NY. Compared to the other Jesuit institutions, quality (e.g. SAT and ACT scores) and diversity indicators are low, while success indicators (e.g. retention and graduation) are average. The recent generosity of the McDevitt family (with their $50 million gift), has catapulted Le Moyne from 25th to tenth in the rankings of endowment per FTE at the 28 Jesuit institutions.

The creation of Le Moyne College was the fortunate result of several forces coming together at an opportune time. Toward the end of World War I, Bishop Walter Foery of the Syracuse Diocese saw the need for a Catholic college in central New York. At the same time, the New York-Maryland province of the Society of Jesus was considering founding a new institution, possibly in upstate New York. With the creation of the GI Bill and the resulting influx of students, as veterans returned from war, Bishop Foery and the Jesuits were able to work together to realize their goals.

Entering into the study, my own knowledge of Le Moyne College was extremely limited. Having grown up in upstate New York, I knew of the institution. The fact that it was a Jesuit institution was only discovered when I began looking for a case site for the study. Of the two
Jesuit institutions in upstate New York, the elements of Le Moyne’s youth, its recent strategic planning activities, and its first lay president all presented as elements suggesting Le Moyne as a unique place for study. At the same time, while I was able to identify these elements, I knew nothing about its history, the results of the strategic planning initiative, or the accomplishments of President Pestello until after the development of the descriptive statement of the Jesuit saga.

In order to guide the study of organizational saga and socialization at the institution, the following research questions were developed:

• How is the descriptive statement of the Jesuit saga manifested in higher education administration at the Jesuit institution being studied?

• In what ways are administrative staff members able to identify the Jesuit saga in relation to their responsibilities and daily activities?

• What specific socialization activities exist to effectively transmit the proposed Jesuit saga?

**Jesuit Saga**

In considering Le Moyne as the case site for the study, I wondered whether its youth as an institution would result in an organization heavily reliant on the Jesuit saga in place of cultural manifestations that had developed on their own. Amidst the interviews, I discovered I was not the only person who viewed Le Moyne’s youth as a key element in its development. One administrator described Le Moyne as a college coming out of its teens and beginning to find itself as an institution. It is an institution where the folklore of the college has yet to develop. There are no common stories told amongst the staff, nor are there common figureheads from the past to which employees all refer. One administrator was very aware of the difference between Le Moyne and other schools where histories are commonly shared across the employees:
I spent a couple days [at another institution] and was struck by exactly that. That you would go into almost any office, and you would hear these common stories. There was a consistency in all aspects of the institution, and it was clearly an indication of what I expected that [the president] would bring to Le Moyne and is beginning to build those common stories. I think that’s a work in progress both in the capturing of those and the telling.

Though there were no common stories shared that were uniquely Le Moyne, it was clear from the interview process that these employees understood the aspects that make Le Moyne a Jesuit institution. The Jesuit identity provided them all a basis upon which they could describe the institution.

After each interview, participants were asked to provide their thoughts on how the descriptive statement of the Jesuit saga resonated with them. In developing the descriptive statement, a conscious effort was made to describe the Jesuit identity in relation to a non-academic administrator’s role, and this slant was not lost on those who responded. Some, especially the Jesuits interviewed, were concerned about the limitation this placed on the description, emphasizing how the mission of evangelization or the academic mission of the Jesuit educational institutions was not captured. Several Jesuits mentioned the lack of specific references to God or spirituality, though only one administrator raised this as a concern. The descriptive statement was written in an effort to create a highly accessible statement for laypersons involved in administrative roles, and the reactions validly identified elements consciously left out of the description in this effort to focus on administrators. There is the potential that the statement, by excluding these references, might move too much toward capturing key elements of any institution, religious of secular, and too far from the specifics of the Society of Jesus.

At the same time, the response from both Jesuits and administrators was quite positive, with comments such as “this is spot on, when it comes to Le Moyne College,” “this is highly
reflective of the opportunity here at Le Moyne for administrative staff,” and “this statement represents the true ‘hallmark’ of Jesuit education.” While the specific Latin words of *cura personalis* and *magis* were not integrated into the descriptive statement, most of those interviewed were able to recognize how those elements were woven into the phrasing. Several participants highlighted specific language as capturing their feelings about the Ignatian spirituality existing at the institution, pointing out phrases such as “at the deepest, most important level,” “empowering,” and meeting students at their “current state of growth and development.”

In analyzing the administrators’ interviews and the feedback regarding the statement, three elements might strengthen the statement to better capture the Jesuit saga in an accessible description for lay staff. First, the initial phrase of the statement is meant to capture the concept of *cura personalis*. In doing so it specifically references students. The level to which the institution values the full care of all members of the Le Moyne community – students, faculty, staff, alumni, etc. – was very apparent in the research. Rephrasing to acknowledge that *cura personalis* is universally applied may strengthen the statement. Second, the element of reflection was common in the Jesuit literature and interviews, and the frequency with which the administrators mentioned it suggests the need for inclusion in the descriptive statement. Capturing the elements of reflection and discernment to demonstrate how these items help strengthen an administrators abilities to foster the institution’s Jesuit identity could make the statement even more accessible. Finally, the concept of inclusiveness was discussed across all interviews – Jesuit, administrator, and elite – and the open and inviting nature the Jesuits demonstrate to all faiths (and even those of no faith) may be critical to capture. Again, the idea of “people on the campus who share our values but not our faith” comes into play. There is a very catholic tradition that has long been an element of the Society of Jesus. At the same time,
Jesuit institutions are Catholic. Capturing both the spirituality of the campus and its openness to all individuals would strengthen the descriptive statement.

**Lay President**

In selecting Le Moyne as the case site, the presence of its first lay president was a specific element of interest. However, the level to which this president had engaged the campus in activities to embrace its Jesuit identity was unexpected. Across the interviews, President Pestello’s efforts to put the Jesuit nature of the institution at the forefront were mentioned again and again. Early in this dissertation, I indicated future leaders on Jesuit campuses would need to study the Jesuit culture in preparation to lead, as well as develop mechanisms to help train and develop aspiring leaders within their communities. This idea was written prior to having interviewed anyone at Le Moyne College. Once those interviews began, I discovered an institution where the lay president had done just that. President Pestello has put great effort into understanding the Jesuit ideals and engaging with Jesuit presidents and leaders to help strengthen those ideals. He spoke highly of the support he has received from Jesuits locally and nationally, and it was clear in meeting with him that this was not simply a lay president that happened to lead a Jesuit institution but that he saw the Jesuit nature of the institution as the core to its success. Furthermore, the administrators selected to participate in the AJCU signature programs were clearly honored by President Pestello’s investment in them as aspiring leaders within the community.

Based on the interviews, it was also clear that President Pestello’s naming of David McCallum, S.J., as Director of Mission and Identity was one of the most crucial contributions to advancing the Jesuit identity of the campus. Fr. McCallum is universally seen as the driving force of the socialization activities, placing the institution’s Jesuit identity front and center on a
daily basis. Fr. McCallum is a devoted alumnus of Le Moyne who views his role as a way of giving back to an institution that has given him so much over the years. In just the past three years, he has initiated a wide variety of activities, ranging from *The Le Moyne Green Book* to the Jesuit Leadership Forum to an expanded Mission and Identity orientation. Fr. McCallum also spoke of the importance of framing events on campus in relation to the contribution they make to the Jesuit identity of the institution. These efforts have strengthened the role the institution’s Jesuit identity plays in the college’s daily activities.

In considering the degree to which these two individuals, President Pestello and Fr. McCallum, have contributed to raising the institution’s Jesuit identity, the question arises as to what will happen once either (or both) have gone on to new opportunities. President Pestello’s commitment to the institution’s Jesuit identity was referenced in many ways, and his OneLeMoyne initiative is universally understood across campus. And Jesuits and administrators consistently deferred to Fr. McCallum as the expert on Jesuit identity and as the one to whom I should really be talking. This deference seemed to be not merely an acknowledgment of his title as Director of Mission and Identity but more to the sheer strength of the role he has played in advancing the institution’s commitment to Jesuit ideals.

Both President Pestello and Fr. McCallum expressed confidence that the strengthened Jesuit identity will survive their departures. They referenced activities put in place to prepare others to step into leadership roles that will keep the Jesuit identity at the forefront. They also acknowledged the organizational changes that have taken place to help carry the efforts forward (e.g. the creation of the Director level position on the President’s council, the development of budgetary lines to support activities, etc.), as well as the role the AJCU is able to play in helping form new leaders. In considering the constructivist approach of individuals seeking
understanding of their world and the influence interactions with others have on this understanding, there is a strong understanding across campus of the role lay staff will need to play to carry on these efforts.

One notable element was the degree to which the administrators’ thoughts aligned with the thoughts of the President and the Director of Mission and Identity. These two “elite” interviews were purposefully scheduled at the end of the research process, and the most noticeable element of the two interviews was the complete lack of surprise. President Pestello and Fr. McCallum are both incredibly eloquent in their description of the Jesuit identity and its place at Le Moyne College. At the same time, amidst this eloquence, they brought little to the research not already expressed by the administrators themselves. This incredible alignment of understanding demonstrates, if nothing else, the level to which the views of President Pestello and Fr. McCallum are understood throughout the community. However, categorizing it as “understanding” fails to capture the level to which administrators embrace the ideas. One administrator described the campus this way:

A fully intentional commitment to the development of the whole person is how I would explain that. I really believe that people show up and discuss what we do, how we do it, what we could be doing different with a shared interest. They come to that meeting with a shared interest in the outcome being the full development wherever the kid in this community wants to go.

Without any knowledge of the descriptive statement of Jesuit saga developed for this research, this administrator captured *cura personalis*, change, and *magis* in a manner quite similar to the descriptive statement (an educational environment that encourages administrative staff to meet the full needs of each student based on his/her current state of growth and development; that empowers administrative staff to identify and act on opportunities for change; and that continuously supports and encourages the question “what’s the best thing I can do to help
someone at the deepest, most important level”). His ability to capture these elements as a lay administrator is a testament to the work President Pestello and Fr. McCallum have done.

As positive as their efforts are, will these common expectations and commitment to the Jesuit identity continue after they are gone? Over and over, individuals referenced the fact that the socialization activities have only been noticeable over the past three years. Is that enough time to truly implant the Jesuit ideals in people’s minds in a way that has “staying power?” The administrators interviewed were all very aware of St. Ignatius as a key figure in the Society of Jesus, and were also keenly aware of the upcoming unveiling of a new statue of St. Ignatius. Is their knowledge of Ignatius tied to the upcoming unveiling, or will that knowledge still be present once the statue has aged and become one of many Jesuit elements on campus? While individuals were able to articulate common Jesuit themes, they were not able to articulate events, stories, individuals, or other elements that were uniquely Le Moyne. The ability of this newfound focus on the Jesuit identity to survive a transition of leadership will be an important test. Le Moyne’s ability to develop its own sense of individuality will also demonstrate whether awareness is solely tied to the presence of a few influential leaders.

OneLeMoyne

OneLeMoyne, the institution’s vision and strategic plan, has clearly become a symbol on campus for the institution’s Jesuit identity. Referenced by almost all the administrator’s interviewed, it incorporates cura personalis and magis in a way that expects everyone in the community to consider the link between their individual work and these concepts. A quick look at the vision and strategic priorities demonstrates the level to which the institution’s Jesuit identity is driving the advancement of the organization. The vision starts with the words “to be a
“premier Jesuit college,” and the first strategic priority is “to fully and energetically express the College’s Catholic and Jesuit mission, identity, and character” (Le Moyne College, 2011, p. 2).

One of the most interesting elements to evolve from this research is the question as to whether OneLeMoyne could become an organizational saga. Clark described the initiation of a saga as, “initially a strong purpose, conceived and enunciated by a single man or small cadre (Selznick, 1957) whose first task is to find a setting that is open, or can be opened, to a special effort” (Clark, 1972, p. 180). Based on the interviews conducted, the speeches given, and the development and implementation process, OneLeMoyne can be accurately described as a strong purpose, conceived and enunciated by President Pestello. While developed and implemented by a broad constituency, OneLeMoyne, as a concept, is uniquely President Pestello’s inspiration. As for a setting open to a special effort, one of the administrators captures this aspect, stating, “Our president is here at a most opportune time. … [He is] the right person to help us, as an institution, realize what that [Jesuit spirituality] means. Help us build those common stories and really come to understand what that identity means.”

If an initiation has occurred, fulfillment of the saga will rely on its ability to endure across the organization. As a strategic plan alone, OneLeMoyne cannot develop into a saga. Strategic plans typically have a timeframe defining their existence before a new planning effort takes place. If a future strategic plan simply replaces OneLeMoyne, then no saga will have developed. If, on the other hand, OneLeMoyne ceases to be about the specific strategic initiatives and tactics, and becomes, instead, a representation of the time when Le Moyne re-committed to its Jesuit identity based on President Pestello’s leadership and initiative, then OneLeMoyne could continue on as a saga even if it is, at some point, replaced as a strategic plan.
Clark articulates the elements of personnel, program, external social base, student subculture, and imagery as necessary for the fulfillment of a saga. Looking at the Le Moyne College activities, there are both the specific elements of the OneLeMoyne plan, as well as the activities occurring alongside its development and implementation. For example, in considering the element of personnel, while not linked to the OneLeMoyne plan specifically, President Pestello’s speeches regarding OneLeMoyne are clearly written to focus on the personnel. His efforts to recognize the close-knit community, as well as to specifically discuss the need for improvement in areas such as personnel development and compensation practices, speak to his commitment. Engaging almost 90 individuals in the implementation process of OneLeMoyne served to develop a strong personnel base. The level to which administrators deferred to OneLeMoyne and the place it holds in propelling the Jesuit identity of the institution forward indicates a commitment to its goals.

In Clark’s reference to the program, he speaks to the curriculum and ways of teaching. In his book, The Distinctive College, he describes three institutions with deep organizational sagas, each having a very unique curriculum and approach to teaching. Alongside the development of OneLeMoyne, a Task Force on Core Revision was also implemented to complete the first major restructuring of the institution’s curriculum in over 25 years. Two prior efforts to update the core curriculum had failed, and the success of the most recent effort is just now being felt in the community. Clark also describes imagery as a component necessary for the fulfillment of a saga: “generalized tradition in statues and ceremonies, written histories and current catalogues, even in an ‘air about the place’ felt by participants and some outsiders” (1971, p. 510) Amidst the implementation of OneLeMoyne, the college has seen significant growth in its imagery, both physical (the upcoming unveiling of a statue of St. Ignatius, the prominent placement of the cross
on the renovated Mitchell Hall, and the wall of Jesuit scientists in the new Science Complex) and ceremonial (the revitalized Mass of the Holy Spirit). The “air about the place,” as described by Clark, resembles one administrator’s description that there is “something underneath” driving individuals to seek to achieve more.

The external social base, often alumni, and the student subculture are two additional elements of fulfillment. Though those interviewed often referenced the commitment of the alumni and their view of Le Moyne students as very unique, the integration of these individuals into the OneLeMoyne vision was not captured in any of the research activities. The involvement of both these groups would be critical for OneLeMoyne to move past its status as a strategic plan to become the saga of the institution’s recommitment to its Jesuit heritage.

“An organizational saga is a collective understanding of unique accomplishment in a formally established group” (Clark, 1972, p. 178). It “refers to a unified set of publicly expressed beliefs about the formal group that (a) is rooted in history, (b) claims unique accomplishment, and (c) is held with sentiment by the group” (p. 179). OneLeMoyne, and the activities that have surrounded it (new curriculum, construction boom, expanded visual imagery, revitalized ceremonies, etc.), combine to represent a unique time in Le Moyne’s history that administrators are already describing with a certain level of sentiment. It remains to be seen whether it has the “stubborn capacity to continue” Clark describes as necessary to translate an exciting story into an enduring organizational saga.

Limitations

As with any research, understanding its limitations helps frame the interpretation of the information. For one, the nature of the program for which the research was conducted required a shortened time span. This placed a limit on data collection, most notable in two places – the
number of individuals interviewed and the follow-up on these interviews. A longer time frame would not only have allowed a broader sampling of the institution, but would have also allowed follow-up with individuals to engage them in further discussion to add depth to some of the elements they described.

The nature of a single case site is another element for consideration. As Creswell (2009) describes, a single instrumental case study allows the use of a bounded case to investigate and illustrate a particular issue. At the same time, the nature of the qualitative case study is to provide a highly descriptive account of the particular site. It does not demonstrate cause and effect relationships. Using Le Moyne College as this single, instrumental case provided the opportunity to explore the nature of how the Jesuit identity was understood by non-academic administrators. The research included both developing a descriptive statement of the Jesuit saga and studying how that saga presented itself at the case site.

Considering the first part of the research, to what degree was the descriptive statement of the Jesuit saga influenced by the case site? The elements of cura personalis, change, and magis all exist within the literature reviewed, but would they have all presented themselves as core elements of the Society of Jesus when combined with Jesuit interviews if, for example, Jesuits at Canisius College were interviewed instead of, or in addition to, the Jesuits at Le Moyne. Was cura personalis (or other elements mentioned) so widely understood by the administrators because it is at the core of the Society of Jesus or because it is at the core of Le Moyne?

Considering the second part of the research, to what extent are the activities occurring on campus a result of the institution’s Jesuit nature? As noted in several interviews, linking the institution’s Jesuit identity to the activities occurring was often tenuous. The link was, at times, no more than a general feeling. There was a level of confidence in their feeling, but not a level
of certainty. For example, is the caring nature of the institution related to its Jesuit identity? Many individuals thought so, but there was also an acknowledgement that the small size of the institution may play a role. *Magis* and *cura personalis* were related to the student development theory of challenge and support on more than one occasion. What makes these terms truly Jesuit, or do these terms simply use Latin to express a student development theory common to many higher education institutions? Is there something underneath that makes Le Moyne truly Jesuit or is Le Moyne simply pursuing the same things that many schools pursue?

*Nuestro modo de proceder*

The administrators at Le Moyne are clearly able to describe a connection they encounter between the Jesuit nature of the institution and the work they do. They describe it using common terms, and they describe it in ways that serve as a motivation for their efforts. In listening to them, I was reminded of the Jesuit phrase *nuestro modo de proceder*. The Jesuits refer to “our way of proceeding” as an element of their society that guides the actions of its members. It provides a basis upon which members are able to act with independence knowing they are pursuing outcomes that meet the ideals of the order. Hearing it described in the Jesuit literature and by individual Jesuits, *nuestro modo do proceder* is another way of saying “organizational culture” and “socialization.” Van Maanen’s description of organizational culture and socialization indicates, “When actions are required, people sharing culture will know what to expect from one another – even if they have not seen one another before” (1984, p. 243). *Nuestro modo de proceder* creates an environment for the Jesuits where they know what to expect of each other. Applying this to a Jesuit educational institution, the organizational culture and socialization that exist serves as *nuestro modo de proceder* for administrators at these schools.
During the course of the research, I discovered that multiple individuals involved in approving my access to the case site had done research on the concept of hiring for mission, and it has been addressed in quite a number of doctoral dissertations. Hiring for mission looks to instill the employee selection process with activities to identify individuals committed to the mission of Jesuit institutions. In completing this research, the shear scope of the socializing activities at Jesuit institutions, combined with the Jesuit ideal of inclusiveness, suggests hiring for mission can be successful when looking for individuals who are open to the Jesuit ideals. Some individuals, such as Konz and Ryan (1999), suggest being Catholic is a critical element to working in a Catholic institution. In looking at the employees of Le Moyne College, it is clear this is not a requirement; that sharing values but not faith can be successful. Individuals who are open to the Jesuit ideals can embrace those ideals through active socialization efforts to help them understand the administrator’s version of **nuestro modo de proceder**. Efforts to articulate **nuestro modo de proceder** is an exercise with potential benefits for any institution, Jesuit or not, in order to help individuals become enculturated in the unique environment of a particular college or university.

*Saga is about history and time. I was reminded of this more than once over the course of this dissertation. The Society of Jesus has been around for 473 years. Le Moyne for 67. While the concepts captured in the term “history” do not grow in a standardized way over specific periods of time, the extra 406 years the Society of Jesus has over Le Moyne no doubt allows for significantly more history to have developed. This history was provided to Le Moyne College as a foundational element when the college was established in 1946, and the case study demonstrates there are aspects of this history that are well understood and play key roles in the achievements of the institution. Le Moyne College has undergone a significant transformation*
over the past few years through its OneLeMoyne process and the activities surrounding it. The element of time is necessary to discover whether OneLeMoyne is simply a strategic plan or an organizational saga waiting to be fulfilled.

In approaching this research, a personal goal was an attempt to create an accessible statement capturing core elements of the Jesuits in an effort to help people who do not have a significant background in religious faiths, like myself, understand what makes the Jesuit educational environment unique. Starting with Jesuit literature, adding Jesuit interviews, and then engaging administrators in discussions about their experiences demonstrated that the descriptive statement developed as part of the research successfully captured key elements and could also be strengthened. Amidst all of this, I admit to feeling significant gratitude in hearing an individual describe the statement, indicating, “it provides an approachable and accessible description of what we mean by cura personalis and magis, adding some color and depth to these terms.” An unexpected element of the research activities was the gratitude many of the participants expressed in response to having the opportunity to talk about their thoughts and experiences related to the Jesuit identity. Beyond any conclusions drawn from the research, the opportunity to have engaged these individuals, to have experienced the enthusiasm of the Le Moyne community, and, hopefully, to have created an environment for individuals to consider the impact of the Jesuit saga on their work were all personal benefits that made this project an important experience.
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APPENDIX A

INFORMATION & CONSENT LETTER

Dear [Name]:

I am a doctoral student working under the direction of Dr. Charles Knapp in the Institute of Higher Education at the University of Georgia, and I would like to invite you to participate in a research study entitled Organizational Saga in Jesuit Institutions. The purpose of this study is to identify how administrative staff come to understand the Jesuit educational mission and how they identify that mission in their day-to-day activities. I have had the opportunity to meet with President Pestello and Father McCallum regarding my plans, and they are both in support of the case study I have proposed.

Your participation will involve an interview consisting of 5-10 open-ended questions and should take about 60 minutes. Your involvement in the study is completely voluntary, and you may choose not to participate or to stop at any time without penalty. An audio recording of the interview will occur, though you may request that the recording be stopped at any time. Once the recording has been transcribed, the audio recording will be destroyed. Only my faculty advisor and I will have access to the research materials collected during the study. There are no known risks or discomforts associated with this research.

The results of the research study will be used to complete my doctoral dissertation and may be used for additional publications, but your name will not be used. Any information that is obtained in connection with this study and that can be identified with you will remain confidential (unless required by law). Your name will not be associated with your responses in any published format. Any quotations will be attributed through the use of a general descriptor (e.g. “an administrator at Le Moyne College” or the like). While there are no potential benefits to you personally, the findings from this project may provide information on how institutions can effectively socialize new employees to the educational culture of the school.

Your participation would be very much appreciated, as I feel that your insights would provide a valuable contribution to this case study. I will contact you next week to inquire as to your interest in participating in this study with hopes of scheduling an interview during the month of May or June, when I will be on campus at Le Moyne. If you already know that you would be interested, please feel free to respond via e-mail to cpuls@uga.edu, or call (617) 947-7484, and I will set up a time for our formal interview.

Thank you for your consideration! Please keep this letter for your records.

Sincerely,
Charles W. Puls

Additional questions or problems about your rights as a research participant should be directed to The Chairperson, University of Georgia Institutional Review Board, 629 Boyd Graduate Studies Research Center, Athens, Georgia 30602; Telephone (706) 542-3199; E-mail Address irb@uga.edu. You may also contact my dissertation advisor, Dr. Charles Knapp, at cknapp@uga.edu or (706) 542-3464.
APPENDIX B

PHONE SCRIPT

Step 1
PI: Hello, my name is Charles Puls, a graduate student at the University of Georgia. I am following-up on the e-mail that I sent you last week in hopes of interviewing you for the case study I am completing at Le Moyne regarding Jesuit educational mission. Did you have a chance to review my e-mail?

Invitee: Yes (proceed to Step 2) (if No, proceed to Step 4)

Step 2
PI: Based on what I sent you, are there any questions I can answer for you about the research I am proposing?

Invitee: Yes, would you explain … (if No, proceed to Step 3)

PI: (answer question). Is there anything else I can answer for you? (Repeat until all questions answered)

Invitee: No. (proceed to Step 3)

Step 3:
PI: Based on what I’ve explained, would you be willing to schedule an interview with me? I am planning to be at Le Moyne several days in May and June and can work around your schedule.

Invitee: Yes (if No, proceed to Step 5)

PI: (PI and Interviewee determine the date, time and location of the interview). Thank you so much for agreeing to do this. I’ll follow-up with an e-mail confirming the date, time, and location of the interview. If any questions arise between now and then, or if you need to reschedule, please don’t hesitate to contact me. (Verify that Invitee has PI’s e-mail address and phone number from initial invitation.) I look forward to meeting you. (Call completed)

Step 4:
PI: In a nutshell, for my doctoral dissertation, I am conducting a case study at Le Moyne focused on how administrative staff come to understand the Jesuit educational mission and how they identify that mission in their day-to-day activities. Based on your role at Le Moyne, I felt that hearing your insights would be helpful, and I was hoping I might be able to come to Le Moyne to spend an hour or so asking you a few questions. (Back to Step 3)
Step 5
PI: Thank you for your time today and for your consideration. (Call completed)
APPENDIX C

INTERVIEW PROTOCOL – KEY INFORMANTS

• *Nuestro modo de proceder* is a phrase that occurs throughout the Jesuit literature. In your own words, how would you describe the core elements that comprise *nuestro modo de proceder*?
• The phrase “to help souls” is another key item in Jesuit literature. How do you see this phrase linking to the role of Jesuit education?
• I don’t come from a Catholic upbringing. In thinking about individuals like me who may not be familiar with the Jesuit identity, how would you describe the core elements of the Society of Jesus to help them understand the essentials of the Society?
  o Do those essentials change at all when thinking specifically about Jesuit educational institutions?
• Not every lay staff member will have the opportunity to study Jesuit history in detail. Given this, what do you think are the most critical elements of Jesuit identity/mission/history that are essential to pass on to lay staff at Jesuit institutions?
• Similarly, the majority of lay staff at Jesuit institutions will never go through the Spiritual Exercises, which is such a unifying experience for Jesuits. What opportunities do you see to provide some type of unifying experience for lay staff at Jesuit institutions?
• How do you view your role in passing along the Jesuit mission to lay staff?
• Ultimately, I am working toward developing a rather succinct statement that will describe the Jesuit educational saga. What elements do you think would be essential for inclusion in that short statement?
• Is there anything else about the saga of the Society of Jesus that you think I should understand based on the nature of my research?

After the key informant interviews are complete, and a definition of the Jesuit saga has been formulated, the following question will be sent via e-mail to those Jesuits who participated:
• Based on a review of Jesuit history, ranging from official documents utilized in the initial creation of the Society of Jesus to academic histories of the Society of Jesus to popular press focused on Jesuits as leadership role models, and supplemented by the interviews with Jesuits at Le Moyne, the following description of the Jesuit saga was created. Please describe how this description resonates with you.
APPENDIX D

INTERVIEW PROTOCOL – ADMINISTRATIVE STAFF

• When I use the term “Jesuit identity” in relation to Le Moyne, what image does that conjure for you?
• Are there common phrases that are used on campus to describe the Jesuit identity?
• What is it about Le Moyne that you think makes working here unique and distinctive?
  o Do you feel the Jesuit mission of the college contributes to that? If so, how?
• Thinking about your daily responsibilities, where do you see your role and activities intersecting with the Jesuit mission?
• What do you feel has been most essential in helping you identify with the Jesuit mission at Le Moyne? (If they indicate something from outside of Le Moyne, follow-up to ask if there is anything that Le Moyne did specifically to help them identify with the mission)
  o What has been essential in helping you maintain this identification?
  o What (other) activities you have participated in to develop your knowledge of the Jesuit mission, Jesuit spirituality, Jesuit identity, etc.?
  o Have you had the opportunity to interact with members of the Jesuit community?
• In thinking about Le Moyne, what elements (events, people, stories, activities) do you think are universally shared across all staff (or close to it) that embody what it means to be Le Moyne?
  o Do you feel the Jesuit mission of the college contributes to that? If so how?
• How do you feel the alignment of your own individual spiritual beliefs and the Jesuit mission impacts your work experience?

• (if time) If you had to choose just one thing that you feel represents Le Moyne’s approach to education, what would you say?
  o Do you feel the Jesuit mission of the college contributes to that? If so how?
• (if time) Has working at Le Moyne resulted in you becoming more familiar with key Jesuits in history? If so, who, and what do you feel is important about those individuals?
• Is there anything else about Le Moyne’s Jesuit history that you think I should understand based on the nature of my research?
• Is there someone else you would recommend on the non-academic side that you think would be a good person for me to talk to in order to gather an alternate perspective on these questions?

Let them know I will follow-up with an e-mail to get their reaction to the Jesuit saga I have developed.
APPENDIX E

INTERVIEW PROTOCOL – ELITE INTERVIEW

• When I use the term “Jesuit identity” in relation to Le Moyne, what image does that conjure for you?
• Are there common phrases that are used on campus to describe the Jesuit identity?
• I don’t come from a Catholic upbringing. In thinking about individuals like me who may not be familiar with the Jesuit identity, how would you describe the core elements of the Society of Jesus to help us understand the essentials of the Society?
• Not every lay staff member will have the opportunity to study Jesuit history in detail. Given this, what do you think are the most critical elements of Jesuit identity/mission/history that are essential to pass on to lay staff at Jesuit institutions?
  o If “to help souls” was not mentioned, ask the following: The phrase “to help souls” is a key item in Jesuit literature. How do you see this phrase linking to the role of Jesuit education?
• In thinking about Le Moyne, what stories are told about people, events, or activities that embody what it means to be Le Moyne?
• What do you think are the most important activities occurring on campus to help administrative staff understand and embrace the Jesuit nature of the institution?
• What do you feel you have done in your role to develop an awareness and understanding of the Jesuit identity at Le Moyne?
  o (if time) {President Only} As the first lay president at Le Moyne, what activities do you think were most helpful in developing your understanding of what it means to be the leader of a Jesuit institution?
• I sent you a descriptive statement that was based on a review of Jesuit history and interviews with Jesuits at Le Moyne. How did that description resonate with you?
• Is there anything else about the saga of the Society of Jesus or Le Moyne’s Jesuit history that you think I should understand based on the nature of my research?
• When you are no longer at Le Moyne, what do you believe will help maintain the Jesuit identity?
APPENDIX F

EMERGENT CODING – JESUIT INTERVIEWS

CA: Catholic/Christian tradition
CACC: Cristo-centric
CADP: Departments where it’s focused (Chaplaincy, Philosophy; Religious Studies)
CAOA: Openness/Accommodation/Enculturation
CAVA: Values

CG: Change

CP: *Cura Personalis* (the full care of the person; help them become a better person)
CPIN: Individualism
CPHS: To Help Souls (re-defining for contemporary times) [aligned with Service]
CPMP: Meeting people where they are; meeting people’s needs

CS: Catholic/Christian Spirituality
CSRF: Reflection
CSRG: Relationship with God

ED: Education as an important part of Jesuit history
EDEP: *Eloquentia Perfecta*
EDIN: Intellectualism

FA: Emphasizing the Faculty role (including emphasis on *not* being involved with staff)
FACA: Challenging the administration
FAIN: Emphasis on *being* involved
FAUN: Unaware of what’s involved in orientation, etc.

FG: Finding God in all things
FGIS: Incarnational/Sacramentality

FR: Faith and Reason – they are not opposed
FRCH: Christian Humanism
FRLK: Linked – academic & spiritual simultaneously

GE: Good example/explanation
GQ: Good quote
GS: Good story

MG: Magis (the most, the best you can do with the time and resources you have available)
MI:  Mission and Identity
MIHM:  Hiring for mission
MIPR:  Presidency

NJ:  No Jesuits left to help
NJME:  Multiplier Effect
NJNC:  Not Catholic (don’t have to be Catholic or Jesuit to support the tradition)
NJRM:  Role Modeling

OE:  Orientation/Events
OEBO:  Events beyond orientation
OEHT:  History/Traditions/Values
OERF:  Reflection
OEVT:  Vocabulary (learning the terms)

OM:  Outreach/Missions
OMCM:  Communication
OMIN:  Internationalism

SE:  Spiritual Exercises
SE19:  19th Annotation (8-month & 8-day) (spiritual exercises in every day life)
SEDE:  Direct experiential knowledge of/relationship with God
SEFA  Familiarization with the SE
SEPT:  Prayed through (not read through)

SV:  Service
SVLN:  Service Learning
SVML:  Leaving monastic life to find God everywhere (contemplative in action)
SVMW:  Men and women for others
APPENDIX G

EMERGENT CODING – ADMINISTRATOR INTERVIEWS

CE: Core Elements
CEFG: Finding God in all things
CEFR: Faith and reason
CERF: Reflection/Examen/Discernment
CESJ: Social Justice

CG: Change

CL: Culture
CLCA: Care/Compassion/Supportive
CLCH: Coming home/Meant to be here
CLCL: Collaboration
CLIN: Intentional culture
CLJU: Jesuit underneath (inc. alt. phrases)
CLLI: Lived ideal

CP: Cura Personalis
CPWL: Wellness

CR: Ceremonies/Rituals

FE: Focused Efforts
FEAJ: AJCU programming
FEFP: Focused programming (all sorts)
FEGB: Green Book/promotional materials
FEHM: Hiring for Mission/Perf Assess
FEOL: OneLeMoyne
FEOR: Retreats/Meetings – office/campus
FERD: Readings

GE: Good example/explanation
GQ: Good quote/story

JI: Jesuit Influences
JIHI: History - pioneers, missions, etc.
JIIL: Ignatius Loyola/Ignatian spirituality
JIOJ: Other Jesuits (Francis, pope, etc.)
JT: “Just there”
    JTAB: Aligns with personal beliefs
    JTCJ: Connects to job
    JTH: Humanitarian thing to do
    JTPA: Prior awareness before Le Moyne

LC: Le Moyne Characteristics
    LCAL: Alumni
    LCBC: Beautiful campus
    LCDT: Difficult times
    LCMC: Becoming more corporate
    LCSI: Spirit, Inquiry, Leadership, Jesuit
    LCSP: Spirituality
    LCYG: Le Moyne is young
    LCYN: Why now?

MG: Magis
    MGEE: Excellence in education
    MGSE: Striving for excellence

MI: Mission & Identity Elements
    MIAI: Staff acknowledging the importance
    MIJI: Jesuit presence/colleagues
    MIJL: Jesuit leader of M&I
    MIPR: Presidency/Lay President
    MIRG: Recent growth of M&I efforts

NJ: No Jesuits left to help
    NJLS: Role of the lay staff
    NJNC: Don’t need to be Catholic

NP: Non-participant
    NPAA: Active avoidance
    NPFL: Feels limited in ability to participate
    NPRS: Resistance to the idea of participate

OC: Ongoing discussion/activities (daily, active)

OP: Openness
    OPAC: Accepting/Supportive
    OPIN: Inclusive (catholic, small c)
    OPOT: Open to think and talk
    OPSP: Open to be spiritual

PB: Personal behavior
    PBBP: Be a better person/personal growth
PBCA: Care/Compassion
PBDE: Drop everything
PBPB: Positive behavior/Role modeling
PBSC: Student/Staff Courtesy/Respect

ST: Stories
STDD: Dolphy Day
STLT: Lack thereof
STUN: Understanding the need

SV: Service
SVMW: Service to others/Servant Leader

TO: Thinks others know the answer/know more

VR: Visual Representations