Fostering Organisational Identity in a Community Service Organisation: A Jesuit Approach

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ABSTRACT

This thesis draws on my forty-five-year experience as a practitioner of social work, spirituality and leadership, including as CEO of Jesuit Social Services, an Australian social change organisation. From this foundation, I develop a model for fostering the values-based identity of a community service organisation, specifically a model for cultivating Jesuit organisational identity in a contemporary context.

The Society of Jesus (the Jesuits) is a male religious order within the Catholic Church. It was founded by Ignatius of Loyola in 1540 and has an expressed commitment to the promotion of justice. This thesis responds to the current challenge for the Jesuits to fulfil their mission and to ensure that organisations bearing their name operate with a distinct and meaningful identity as their numbers diminish and as these organisations are increasingly staffed and led by laypeople. A clear pragmatic aim of this thesis is to articulate a model for fostering this identity, which could be adapted for use by others in the Jesuit network and beyond.

To achieve this, I use autoethnography to identify insights from my experience, synthesising these with findings from my examination of key source documents from Ignatian and Jesuit heritage. This process illuminates features relevant to Jesuit identity in a community sector context. I examine scholarship in the field of organisational identity to then inform an ecological model of identity as a 'sense-giving' and 'sense-making' exercise, whose essence is both entity and process.

Outcomes of the research include a list of elements that reflect Jesuit identity when applied in a community service setting; a schema that spells out the relationship between these elements; a framework for operationalising identity across the personal, practice and business process domains of the organisation; and a model that demonstrates how organisational identity is understood and fostered.

STATEMENT OF AUTHORSHIP

Except where reference is made in the text of the thesis, this thesis contains no material published elsewhere or extracted in whole or in part from a thesis accepted for the award of any other degree or diploma. No other person's work has been used without due acknowledgment in the main text of the thesis. This thesis has not been submitted for the award of any degree or diploma in any other tertiary institution.

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Julie Mary Edwards, 13 January 2021

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GLOSSARY

Accompaniment: Walking alongside someone in a relationship characterised by reciprocity (Delobre, 2012, p. 3).

Apostolate: See Social Apostolate.

Bull: This term refers to a particular form of papal document. The Society of Jesus was officially founded in 1540 when Pope Paul III approved the 'Formula of the Institute of the Society of Jesus' (Ignatius of Loyola, 1540/1996d) through the bulla *Regimini Militantis Ecclesiae*. A revised 'Formula' (Ignatius of Loyola, 1550/1996e) was approved by Pope Julius III in 1550, through bulla *Exposcit Debitum*.

***Cura personalis*:** The term *cura personalis* was first used in the twentieth century to describe 'the responsibility … to care for each man in the community with his unique gifts, challenges, needs, and possibilities' (Howell, 2017b, p. 214).

Charism: In the Catholic Church, religious orders are understood to have specific charisms that usually relate to their founders and are given expression in an ongoing way within the communities, works and organisations of the order (Le, 2016).

Community sector*: In this thesis, I use the term to mean community-based organisations or institutions, in contrast to those operated by government or large corporations, whose operations 'typically include activities that support individual and family functioning. They can include financial assistance and relief to people in crisis but exclude acute health care services and long-term housing assistance' (Steering Committee for the Review of Government Service Provision, 2013, F. 2).

Community service organisation*: In the Australian context, that term refers to an organisation that 'has benevolent relief as its main purpose, and that relief is provided to people in need' (Australian Charities and Not for Profits Commission, 'Is My Charity' section, 2018). Such organisations may be funded through a variety of sources including government, philanthropy and individual donors.

Conference: The Conferences are structures of administration within the Society. Currently there are six Conferences: Africa and Madagascar, Asia Pacific, Europe, Latin America, South Asia, and Canada and USA. The Conferences work to 'create more adequate governmental and administrative structures to ensure that the universality of the

Ignatian vision of mission could correspond to the new exigencies of our globalised world' (O'Hanlon, 2017, p. 186).

Consolations and Desolations: The writings of Ignatius of Loyola allude to 'good' spirits experienced as feelings leading us towards love, healing and relationship; and, conversely, 'bad' spirits leading us away from life-giving choices towards destructive thoughts and actions that damage relationships. Learning to be aware of these different spirits and their corresponding consolations, 'an inner movement whose dynamic draws a person toward God' (O'Leary, 2017a, p. 193), and desolations, 'an inner movement which … leads a person away from God' (O'Leary, 2017b, p. 228), is the essence of Ignatian discernment.

Constitutions of the Society of Jesus: 'The Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c) consolidate the mission and purpose of the Society, provide guidelines that govern Jesuit life and 'give a fuller and more particularised treatment of various matters' (Society of Jesus, 1559/1996, p. xviii) that are outlined in the 'Formula of the Institute' (Ignatius of Loyola, 1540/1996d, 1550/1996e). The 'Constitutions' (Ignatius of Loyola, n.d./1996c) is considered the text that 'keeps the basis of Jesuit identity safe' (Coupeau, 2010, p. 5).

Contemplatives in action: This expression refers to the ongoing process of reflecting on experience in order to inform action, which is then reflected upon to inform future action. 'Jerome Nadal famously described Ignatius as a man to whom God had become so present that he was "contemplative likewise in action," "finding God in all things"' (Shea, 2017b, p. 300).

Decree: Decrees are 'legislative enactments' of the General Congregations of the Society of Jesus (Padberg, 1994, p. ix).

Desolations: See Consolations and Desolations.

Discernment: In the Jesuit tradition, 'discernment is the exercise of spiritual wisdom to identify what is and is not of God. The practice of Ignatian spirituality involves two overlapping yet distinct kinds of discernment. The first is the discernment of spirits, in which good interior movements are distinguished from those that are not … The second is the discernment of the will of God in a particular matter, which in the Exercises is done through an "election"' (Shea, 2017a, p. 234).

Domain*: I use the term *domain* to refer to a field of activity. For example, the three domains of the Way of Proceeding framework are Human Spirit, Practice Framework, and Business Processes.

Elements*: I use the term *elements* to refer to key components of Jesuit heritage. Each element and domain in the Way of Proceeding comprises various *features*.

Encyclical: An encyclical is 'a circular letter' from the Pope to the bishops of the world for the universal Church (Catholic Online, 2020a, Vol. E).

Exercises: See Spiritual Exercises.

Faith doing justice: See promotion of justice.

Features*: I use the term *features* to mean prominent characteristics of an element or domain of the Way of Proceeding. For example, the element of *gratitude* comprises features such as *everything is gift*.

Felt knowledge: This refers to an interior knowledge that moves beyond intellectual understanding to 'the intimate feeling and relishing of things' (Ignatius of Loyola, n.d./1996g, p. 283, para. 2).

Formation: Process of development and training (Orobator, 2017, pp. 302–303).

Formula of the Institute: The *Formula of the Institute* (Ignatius of Loyola, 1540/1996d, 1550/1996e) is the founding document of the Society of Jesus, directly under the Pope's authority. It was revised in 1550 (Ignatius of Loyola, 1550/1996e). This document is 'the basic "rule" of the Society of Jesus' and 'exhibits the fundamental structure of the Society' (Padberg, 2017, p. 305).

Framework*: I use the term *framework* to mean a structure composed of parts that fit together. This applies to the Way of Proceeding framework and its three domains.

General Congregation: General Congregations are significant meetings of the Society. Their purpose is set out in the 'Constitutions' (Ignatius of Loyola, n.d./1996c). They do not occur on a regularly scheduled basis, but are convened only for significant matters such as electing a new superior general or strengthening the focus of the Society to a particular area of concern (Corkery, 2017b; Ignatius of Loyola, n.d./1996c).

General Examen: The General Examen, a document that forms part of the Constitutions,

'is used during the assessment of applicants who wish to join the Society … The purpose of the General Examen is to allow the applicant to get to know the Society and the Society, through its representatives, to get to know the applicant. When both sides are satisfied, the applicant may enter the novitiate' (O'Leary, 2017b, p. 194).

Helping souls: The Formula of the Institute (Ignatius of Loyola, 1540/1996d, 1550/1996e) established *helping souls* or the *care of souls* as central to the Jesuits' purpose and impact. This can be understood as care for the whole person, in body, mind and spirit (O'Malley, 1993).

Ignatius of Loyola: St Ignatius of Loyola is the founder of the Society of Jesus. He was born in 1491 and died in 1540. Ignatius of Loyola developed the *Spiritual Exercises* (Ignatius of Loyola, n.d./1996g), a book of meditations that provides the basis of Ignatian spirituality.

Ignatian Pedagogical Paradigm: The Ignatian Pedagogical Paradigm is one of the Society of Jesus's official documents on education. Published in 1993, its primary purpose is to assist educators to teach in accord with the purposes of Jesuit education. The Ignatian Pedagogical Paradigm was not intended to be used solely in Jesuit schools and universities, 'but it can be helpful in every form of educational service that in one way or another is inspired by the experience of St Ignatius' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 369).

Ignatian spirituality: This refers to the particular approach to living in relationship with God that comes from Ignatius of Loyola. Ignatian spirituality is the foundation of Jesuit identity, and can be described as a spiritual 'way of proceeding' (Fleming, 2008, p. vii). The basis of Ignatian spirituality is the 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g).

Image*: I use the term *image* to mean a representation of something. I refer to the *one foot raised* image of Ignatius, which represents a particular way of operating and being in the world.

Indifference: In the Ignatian tradition, the term 'indifference' has a specific meaning, which is derived from 'a Christian theological anthropology that understands the end and deepest desires of the human person as fulfilled in God alone … Positively expressed, Ignatian indifference involves the realization of an interior freedom that enables one to habitually choose this magis' (Shea, 2017c, p. 392).

Jesuits: The members of the Society of Jesus have, from its early days, been referred to as 'Jesuits' (O'Malley, 2013). As such, the term 'Jesuits' can refer to the Society of Jesus itself and also to those men who are members of the Society of Jesus.

Magis: The Latin word *magis* 'serves as shorthand for the dynamism that lies at the heart of Ignatian spirituality. It is characteristic of Ignatius to use the comparative "more" or "greater" in a variety of circumstances' (O'Leary, 2017c, p. 495). The concept of *magis* calls us to identify the greater good that should be enacted in any situation; not just settling for the *good*, but striving for the *more.*

Model*: I use the term *model* to refer to a simplified representation of a system or phenomenon. I use this term in relation to organisational identity.

Novice/Noviciate: To become a Jesuit, there are three periods of probation. The noviciate is the second period of probation: 'If, at the end of the two-year novitiate, a novice has shown "an initial, but tested and authentic, connaturality with our way of proceeding," he may be admitted to first vows (Kolvenbach, Formation of Jesuits, 25)' (Maczkiewicz, 2017, pp. 565-566).

One foot raised: Ignatius of Loyola wrote that Jesuits should live 'always with one foot raised, ready to hasten from one place to another, in conformity with our vocation and our Institute' (Ignatius of Loyola, 1548–1550/1903–1911, p. 581). The image of walking *with one foot raised* compels us to be both grounded in reality, while seeking the *magis*, the *more.*

Order: In the Catholic Church, a religious order is a type of religious institute (Catholic Church, 1983). It refers to community of people who take solemn vows and 'whose members strive to achieve the common purpose of formally dedicating their life to God' (Rost & Graetzer, 2013, p. 292).

***Promotio Iustitiae*:** This is a periodical produced by the Social Justice and Ecology Secretariat of the Society of Jesus, first published in 1977.

Promotion of justice: At *General Congregation 32* (Society of Jesus, 1975/2009b), the Jesuits committed to 'the service of faith, of which the promotion of justice is an absolute requirement. In one form or other this has always been the mission of the Society' (p. 298, d. 4, n. 2–3). In General Congregations 33, 34 and 35, 'the Society would expand the scope of Decree 4 by including dialogue with other religious traditions, the

environment, and the challenges of globalization as central to its mission and as further areas for the promotion of justice' (Reiser, 2017, p. 737).

Province/Provincial: In the Society of Jesus, 'Jesuit communities and apostolic works are organized by provinces … The Jesuit superior general appoints a provincial for a six-year term to head up each province ... Although candidates to the Jesuits enter a specific province, they, in fact, join the worldwide Order and can be missioned by their superior to any part of the world' (Howell, 2017c, pp. 655–656).

Schema*: I use the term *schema* in the sense of conceptual framework, the narrative that spells out the interrelationship of its components.

Second Vatican Council: This term refers to a significant council of the Catholic Church, called for by Pope John XXIII, and concluded under Pope Paul VI. The Council occurred between 1962 and 1965 (Catholic Online, 2020b, Vol. S).

Social Apostolate: The word 'apostolate' comes from *apostolos*, 'Greek for an apostle – one who is sent on mission. Over the centuries Jesuits have developed a multitude of apostolates' (Howell, 2017a, p. 38). The roots of the social apostolate can be traced back to Ignatius and the first companions, but this term was not used until 1946. The social apostolate encompasses a range of works including accompaniment of the poor, service delivery, social research, policy development and advocacy. These works may be undertaken by organisations (often called social centres), by groups or by individual Jesuits (Alvarez de los Mozos, 2019; Social Justice Secretariat, 2005).

Social Justice and Ecology Secretariat (SJES): Secretariats of the Society support the superior general in developing particular missions. For example, the Social Justice and Ecology Secretariat assists the superior general 'in developing the apostolic mission of the Society in its dimension for promoting justice and reconciliation with creation' (Society of Jesus, 2020b).

Society of Jesus: The Society of Jesus is a male religious order within the Catholic Church. The Society was founded by Ignatius of Loyola (1491–1556) in 1540. Today, it is the largest male order in the Catholic Church (Jesuits, n.d., 'The Jesuits', para. 3).

Spiritual Exercises: The Spiritual Exercises is a text written by St Ignatius of Loyola that forms the basis of Ignatian Spirituality. It was first published in Latin in 1548. 'Ignatius Loyola's most important writing, Spiritual Exercises, is a collection of resources for people seeking to develop their lives as Christians. It presents various

techniques of prayer, supplemented by maxims of practical wisdom and approaches to decision making' (Endean, 2017, p. 757).

Superior general: This is the highest position in governance within the Society of Jesus. Also known as the general superior or father general. 'The General Superior is mandated by a General Congregation, the highest governance body in the Society, to govern the Society on a day-to-day basis together with his counsellors and other governing structures of the Society' (Society of Jesus, 2020a).

Tertian: Tertianship is the third stage of probation in the process of becoming a Jesuit. 'The third probation, usually lasting eight to ten months, takes place after priestly ordination and before a person's final vows. Jesuit brothers make their tertianship about ten years after their first vows. Those engaged in making the tertianship are called tertians' (O'Leary, 2017d, p. 780).

Way of proceeding: Central to the Jesuits from their establishment was their *way of proceeding*. Jerome Nadal, a contemporary of Ignatius, wrote that 'the form of the Society is in the life of Ignatius … God set him up as a living example of our way of proceeding' (cited in Society of Jesus, 1995/2009d, p. 659, d. 26, n. 1). As such, the 'way of proceeding' refers to the Jesuits' 'style of life and ministry' (O'Malley, 1993, p. 8). Drawing on the *Spiritual Exercises* (Ignatius of Loyola, n.d./1996g), the 'way of proceeding' speaks to an approach, rather than the adoption of specific activities (Garcia de Castro Valdes, 2016). It is rooted in Ignatian spirituality.

Weeks: The *Spiritual Exercises* (Ignatius of Loyola, n.d./1996e) are divided into four 'Weeks' or phases. The *Exercises* are undertaken during a retreat, under the guidance of a spiritual director, usually conducted over a period of thirty days.

All terms are from Ignatian or Jesuit heritage except where otherwise indicated (*).

CHAPTER 1

Introduction

In the twenty-first century, the rapidly changing, increasingly networked and competitive operating environment presents a challenge for organisations to create and maintain an authentic, transparent, consistent and culturally relevant image, or identity (Alvesson, 1990/2004; Hatch & Schultz, 2004b). This thesis contributes to the growing scholarly interest in organisational identity by examining the significance and structure of a Jesuit identity in the context of my own experience leading an Australian Jesuit community organisation called Jesuit Social Services. It is the product of a 45-year engagement with social justice issues and deep, ongoing relationships with people on the margins, including nearly 20 years at Jesuit Social Services; and it brings together theory and practice – across social work, Ignatian spirituality, the Jesuit justice tradition and organisational identity studies – to analyse those elements from Jesuit heritage that can usefully serve as the basis for Jesuit identity in a community service organisation, and to develop a model for fostering that identity in a contemporary context.

Organisational identity addresses the question of *who* an organisation is or perceives itself to be (Pratt, Schultz, Ashforth, & Ravasi, 2016b). It is not a gimmick, a badge or a brand; rather, it has been described as what is central, distinctive and enduring about an organisation (Albert & Whetten, 1985/2004). That is, identity is fundamentally about 'how a collective defines itself' (Pratt, Schultz, Ashforth, & Ravasi, 2016b, p. 3) and constitutes 'the most meaningful, most intriguing, most relevant concept we deal with in both our personal and organizational lives' (Gioia, 2008, p. 63). A robust, values-based identity provides a compass to guide organisations at critical times when they have to make ethical and strategic choices. Organisational identity influences how staff understand themselves, their role and purpose. It shapes the nature and quality of practice, directly affecting some of the community's most vulnerable people. It supports organisations to fulfil their purpose, including strengthening civil society, which impacts on us all.

As CEO of Jesuit Social Services, an Australian Jesuit community service organisation, I have drawn on Jesuit heritage to shape, guide and nourish the organisation's identity. The Society of Jesus (the Jesuits) was established nearly 500 years ago, yet my experience is that its heritage is well suited to adapt to our times. It is flexible and aspirational. Further, the Jesuits have a rich tradition of commitment to those in need and in, what today is often termed, *faith doing justice* or *promotion of justice*. At

the same time, like other parts of the Catholic Church, the Society of Jesus, a male religious order within the Church, is wrestling with a number of challenges. This includes how to preserve the identity of its organisations in the face of dwindling numbers of Jesuits and growing numbers of laypeople leading and staffing their institutions. As a woman, a social worker, and a layperson without formal training in theology or Jesuit studies, I have faced particular challenges in exercising my leadership role in this context. Inevitably, I have experienced being both an insider and outsider (Finefter-Rosenbluh, 2017) to the Jesuit enterprise. This status allows me to have a deep appreciation of the heritage while retaining a clarity of perspective about its essential features and how it can be translated and adopted in new contexts, specifically the complex social setting of the community sector in the current era.

Thus, my central research aim in this thesis is to develop a working model to foster Jesuit identity in a community service organisation in a contemporary context. My review of the literature revealed that there is a dearth of literature on this topic. This is a significant gap given the critical importance of the Jesuits remaining true to their mission to promote justice, which depends in part on their confidence in the Jesuit identity of their organisations being ensured. At a broader level, the thesis addresses knowledge and practice gaps in the community sector by providing a values-based model for fostering organisational identity. As the thesis will argue, the question of identity is becoming more urgent as community service organisations strive to meet the needs of vulnerable people and communities in an environment increasingly dominated by neoliberal policies and practices.

In this chapter, I situate myself in relation to the research, specify my research aims and spell out the operating context for my study: Jesuit Social Services, the community sector, and the Jesuits. As indicated, the challenges facing both the Jesuits and the community sector more broadly point toward the necessity of a coherent and integrated values-based identity for contemporary community service organisations. My research draws on my experience in Jesuit Social Services, which was the locus for the development of the model that is central to this study. I also introduce the organisational identity field whose literature provides a strong theoretical underpinning to inform my model for fostering organisational identity. In examining the problem of how to foster Jesuit identity in a community service organisation in a contemporary context, this thesis develops a methodology that combines autoethnography and a Jesuit-informed approach from the education sector, known as the ‘Ignatian Pedagogical Paradigm’. The latter is

used to guide the autoethnography, organise the thesis structure and provide the overarching framework for its analysis.

Positioning Myself

The search to find meaning and purpose is central to the human person and has shaped my life. It has led me to explore spirituality, contemplative practices and social justice pursuits, personally and collectively with like-minded seekers or professional colleagues. Over the years, it set me in the direction of working and studying in the fields of social work, family therapy, grief and loss, and leadership.

As a social work practitioner, organisational leader and a person deeply interested in spirituality and guided by the Christian faith, my longstanding passion has been promoting social justice – engaging and supporting people in need and addressing structural inequity. Much of my focus has been on cultivating good practice, which covers a range of activities, including accompanying people; delivering services; creating educational and employment pathways; building strong communities; and undertaking research, policy and advocacy work. My concern for good practice has driven my interest in organisational identity. As a social worker, I am aware that practitioners do good work in a range of circumstances. My experience indicates, however, that for such practice to be optimal and to endure, it needs to be grounded in an organisational setting that supports, inspires and sustains that practice.

Organisations operating in this way understand that they are social change agents, not solely service providers or entities contracted by government to deliver interventions. This understanding resonates with social work's purpose to promote 'social change and development, social cohesion, and the empowerment and liberation of people', with its principles of 'social justice, human rights, collective responsibility and respect for diversities' and its efforts to engage 'people and structures to address life challenges and enhance wellbeing' (International Federation of Social Workers, 2014, 'Global Definition of the Social Work Profession'). This understanding is also supported by Jesuit heritage (Kolvenbach, 1997; Padberg, 1994) and Jesuit Social Services' own history (Dunin, 2009).

In undertaking this research, I draw on my experience over decades of attempting to bring together my personal spiritual insights; my grounded experience of engagement with people on society's margins; and my deepening analysis of social and environmental injustice with a professional exploration of how to orient an organisation

to support the vocational hearts of its people and operate with a values-based identity. I have observed that without a strong values-based identity, organisations lose their way, floundering in the absence of anything more substantial than a business model and a growth strategy to guide their direction.

Becoming CEO of Jesuit Social Services in 2004 provided me with a platform to synthesise my personal experience with the Jesuit tradition and to apply and test it in an organisational setting in a contemporary context. This is the basis of the organisational approach I developed, which sought to bring these worlds together. It involved intuiting elements from this heritage that support the organisation's social justice purpose and articulating a framework to operationalise it across all aspects of the organisation's activity. It is also the stepping-off point for this research, where I seek to go deeper in my efforts to bring the sixteenth-century inspiration of Ignatius of Loyola, the founder of the Jesuits, together with the twenty-first-century realities of a community service organisation. I undertake this research from the position of being embedded in the organisation I lead, passionate about the topic and grateful to have the opportunity to look afresh at it. Significantly, I do it through the eyes of a layperson, social worker and practitioner of Ignatian spirituality.

Research Aims and Context

The primary aim of this research is to articulate a model for fostering the identity of a community service organisation in a contemporary context. The secondary aim is to identify the elements and features from Jesuit heritage that speak to Jesuit identity of a community service organisation. I have experienced the benefits of Jesuit identity when applied to a community service organisation and I now want to incorporate my practice wisdom with a reflective review of Jesuit heritage. I situate my model within the knowledge context of the organisational identity field. The desire to articulate this model is fuelled by the current operating context in which I observe the community sector and the Jesuits each contending with particular challenges that go to the heart of their identity. My model has the potential to assist them to address these challenges.

Jesuit Social Services has its origins in 1977 when a Jesuit in training established a service to respond to the needs of young people involved in the criminal justice system. Since then, it has expanded its scope to respond to the needs of, and advocate for, people of all ages who are in trouble with the law – who are often contending with a range of overlapping problems, including mental illness, substance abuse, homelessness,

displacement (including refugees and people seeking asylum) and unemployment – and people experiencing long-term, complex disadvantage, including Aboriginal people and communities. The organisation has its central office in Melbourne, Australia, and operates in a number of jurisdictions across the country. It has a national profile in relation to particular issues of social injustice, such as place-based disadvantage (Vinson & Rawsthorne, 2015), and criminal justice (Jesuit Social Services, 2017). In 2020 it employed over 300 staff and engaged over 300 volunteers.

Jesuit Social Services is a community service organisation. In the Australian context, this term refers to an organisation that 'has benevolent relief as its main purpose, and that relief is provided to people in need' (Australian Charities and Not for Profits Commission, 'Is My Charity' section, 2018). Such organisations may be funded through a variety of sources including government, philanthropy and individual donors. As a community service organisation, Jesuit Social Services operates within the community sector, which is currently facing a number of challenges (Shergold, 2013; Smith & Merrett, 2018). The encroachment of neoliberal philosophies and practices is having a marked impact on the sector. This is reflected in decreasing resources and competitive processes for securing contracts to deliver services, and increased compliance and focus on risk management in service delivery (Smyth, 2016). Another matter of concern is the introduction to the field of for-profit companies, including a number of large multinational companies that have a poor track record in service delivery in other countries (Goodwin & Phillips, 2015). In the face of this shift, many community service organisations have somewhat inevitably adopted the dominant neoliberal paradigm and have stepped away from their responsibility to tackle structural injustice (Berman, Brooks, & Murphy, 2006; Dalton & Butcher, 2014).

Within this broader political context, the Jesuits face a number of other challenges that impact on their mission to promote justice, including the ageing of existing members and fewer people joining their ranks, resulting in diminishing numbers of Jesuits (Worcester, 2008). This is paralleled by an increasing number of laypeople staffing and leading their organisations (Kolvenbach, 2004) and fuels the Jesuits' concern regarding how they ensure that these organisations operate with a strong Jesuit identity (Guibert, 2018).

Introducing the Society of Jesus and Ignatius of Loyola

The Society of Jesus is the largest male religious order within the Catholic Church, with approximately 16,000 members operating in more than 100 countries (Jesuits, n.d., 'The Jesuits', para. 3). The Society was founded by Ignatius of Loyola (1491–1556), a Basque, and his first nine companions in 1540 (Caraman, 1990). Ignatius developed the 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g), a book of meditations, which provides the basis of Ignatian spirituality and has been widely influential (Sheldrake, 2013).

Ignatian and Jesuit heritage are not synonymous. Ignatian heritage lies at the heart of Jesuit heritage and should be fully represented there. However, over the centuries the Jesuits have developed their own heritage, solidly based on Ignatian heritage (O'Malley, 1993); and others outside the Jesuits have embraced Ignatian spirituality, including religious orders who have given it their own expression (Maryks, 2014). In this thesis, I recognise that Jesuit heritage sits inside broader Ignatian heritage; I therefore use both terms, and when referring to Jesuit heritage I am assuming the central place of Ignatian spirituality within it. The members of the Society of Jesus have, from its early days, been referred to as *Jesuits* (O'Malley, 2013). The term *Jesuits* can refer to those men who are members of the Society of Jesus, and also to the Society of Jesus itself. Additionally, at times in this study I refer to the Society of Jesus as the *Society* or the *order*. The adjective *Ignatian* is used to refer to various matters relating to Ignatius – for example, *Ignatian spirituality*, *Ignatian ethos*, *Ignatian heritage*, *Ignatian pedagogy*. While the term *social centres* is used occasionally in this study, and is inclusive of Jesuit Social Services, in the main I use the term *community service organisation* in relation to Jesuit Social Services. This is in keeping with Australian terminology.

Jesuit Social Services falls within the Jesuits' *social apostolate*, a term first used in 1946, though its roots can be traced back to Ignatius and his first companions. This apostolate encompasses a range of works including accompaniment of the poor, service delivery, social research, policy development, and advocacy. These may be undertaken by organisations (often called *social centres*), by groups or by individual Jesuits (Alvarez de los Mozos, 2019; Social Justice Secretariat, 2005). The secretariat for the social apostolate (now called the Social Justice and Ecology Secretariat) was not established until 1969 (Alvarez de los Mozos, 2019). It was in that era that many social centres were established, and Jesuit Social Services can trace its own establishment to this period.

The Jesuits have a strong track record of being influential across a number of domains (Worcester, 2008), and a commitment to social justice is central to their concerns (Ignatius of Loyola, 1540/1996d, 1550/1996e; Society of Jesus, 1975/2009b, pp. 298–316; Society of Jesus, 2008/2009e, pp. 744–754, d. 3). Due to their size, extensive geographic reach and active presence – from the grass roots through to centres of research and influence – they are in a position to make a significant impact on the social problems of our day. I argue, however, that a dearth of strong organisations in the social apostolate and a lack of a coordinated, strategic approach impede their efforts to fulfil their social mission. This highlights the value of articulating a model for fostering Jesuit organisational identity that can be used and adapted by others in the Jesuit network.

Significance of My Research

This thesis seeks to make a number of contributions to knowledge and practice relevant to the Jesuits, to the community sector and to the field of organisational identity. First, it articulates the elements and features that speak directly to Jesuit identity in a community service setting, and then applies these to an organisational model for fostering this Jesuit identity. By articulating a model, rather than a template to be actioned mechanistically, I present my findings in a way that can be adapted by others working in the Jesuit enterprise for use in their contexts. I draw on key documents from Ignatian and Jesuit heritage from the perspective of a layperson, a social worker and a leader in a Jesuit organisation. My purpose is to identify elements pertinent to Jesuit identity that can be applied in a community service setting.

Second, my research provides the *community sector* with a model that supports a values-based organisational identity. This plays a vital role in fostering practice and advocacy that looks to the good of the person and the community, thus providing a bulwark against the dominance of neoliberalism. The particular value of this model is that it is grounded in the experience of a social work practitioner and leader – experience that is influenced by and synthesised with Jesuit heritage – and the findings are presented in an accessible way that ensures it has practical application. This facilitates organisations adapting and applying the model, or its components, in ways that suit their circumstances.

Third, the model I have developed over the course of this research contributes to the field of *organisational identity* by introducing a specifically Jesuit approach to the

existing scholarship. As will be illustrated in the literature review (Chapter 4), it is apparent that the overwhelming number of studies in this field relate to the business sector. I located numerous studies focused on the community sector, but I identified a gap in the literature in relation to Jesuit organisational identity when applied to a community setting. My research aims to address this gap. Further, my model supports the growing convergence of perspectives, in the scholarly literature, that is emerging between the ontological (Gioia & Hamilton, 2016) and epistemological (Kreiner et al., 2015) dimensions of organisational identity.

Methodology

Autoethnography is a form of personal narrative (Méndez, 2013) that uses self-reflection to intentionally explore the relationship between personal and broader cultural and social meanings (Ellis & Bochner, 2000). I chose this methodology because it allows me to draw on my experience and incorporate it with theory and knowledge. This approach is consistent with a Jesuit and Ignatian understanding that values moving beyond knowledge to 'the intimate feeling and relishing of things' (Ignatius of Loyola, n.d./1996g, p. 283) and to allow that experience, once reflected upon, to inform action. It is consistent, too, with being a social worker whose 'prized position at the seat of the human drama is wasted unless the social worker goes beyond this surface layer of observations' (Harrison, 2014, p. ix). It also resonates with a feminist approach to research that prioritises the researcher's experience (Ellis, 2004) and use of non-traditional data (St. Pierre, 1997).

Scholars debate the strengths and limitations of this methodology, particularly where research should be located on the emotive–analytic continuum (Anderson, 2006). I address this concern by complementing my autoethnographic methodology with the Ignatian Pedagogical Paradigm, which is 'inspired by the experience of St Ignatius' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 369). I adapt this paradigm from the Jesuits' education sector to help guide and structure the presentation of my primary autoethnographic sources. Further, in keeping with the reflective orientation to my research, and consistent with Jesuit heritage, I also use this paradigm to structure the overall approach to my research design. In Chapter 2, I expound on the paradigm and its five non-linear, overlapping components: context, experience, reflection, action and evaluation.

Research Design

I chose the Ignatian Pedagogical Paradigm as the framework and approach to guide my research design in order to best achieve my research aim. In this paradigm, the first component is context. In examining the context for this study, I provide an overview of both the community sector in Australia and the Society of Jesus, which together form the operating context for Jesuit Social Services, the organisation I lead and the setting where I develop my model. I then examine the knowledge context for this study by reviewing the literature relating to the organisation identity field. Experience is the next component of the paradigm. I employ an autoethnographic approach to help access personal experiences, lessons and insights that shed light on Jesuit identity and how to foster it in a community service organisational setting. The component of reflection follows experience. In this part of the research process, I reflectively review Ignatian and Jesuit heritage to identify elements that speak to the Jesuit identity of a community service organisation. In the Ignatian Pedagogical Paradigm, everything is geared to the next component – action. During this phase of the research, I review and distil what has emerged in my study to this point. These findings are enacted by feeding directly into an operational model I present for fostering the Jesuit identity of a community service organisation in a contemporary context. Evaluation is the final component of the paradigm. In this stage, I step back to consider the study's contribution to knowledge and practice, and also its limitations. Finally, I identify new areas of research.

Chapter Outline

In Chapter 2, 'Methodology', I position myself in relation to the research and spell out my reasons for adopting autoethnography. I discuss current debates and concerns about benefits, limitations and ethics associated with this methodology. I then expound on the Ignatian Pedagogical Paradigm and its five components.

In Chapter 3, 'Operating Context', I provide a brief history of the community sector in Australia and identify current challenges relevant to my topic. I then introduce the Society of Jesus and its founder, Ignatius of Loyola, which together provide the foundational context that lies at the heart of any expression of Jesuit identity. I provide an overview of the order's history relevant to this study, focusing on its social mission. I introduce Jesuit Social Services, the organisational context where the model for fostering the Jesuit identity has been developed, implemented and continues to be refined.

In Chapter 4, ‘Literature Review’, I examine the organisational identity literature that is a key component of the knowledge context for my research. The purpose of this chapter is to provide a strong theoretical foundation to inform the model I articulate, to elaborate on current gaps in knowledge, and to identify emerging understandings relevant to my research. In situating my research within these operating and knowledge contexts, Chapters 3 and 4 fill out the purpose and importance of the research.

Chapter 5, ‘Experience’, draws on primary autoethnographic sources – diaries, notebooks, letters and articles – which provide the data for the thesis. The chapter uses the Ignatian Pedagogical Paradigm to guide and structure the approach I take to my personal data as I move chronologically through my life. In drawing on my experience to identify findings relevant to the topic, I trace the antecedents of the elements from Jesuit heritage that I intuited in the course of my work and currently use to foster Jesuit identity, and the framework I developed to operationalise organisational identity. I identify new features relevant to Jesuit identity in this context and introduce the tree image that I later develop as my dynamic model for fostering the Jesuit identity of a community service organisation.

In Chapter 6, ‘Reflection’, I go directly to key sources from Ignatian and Jesuit heritage. I engage with these central texts from my perspective as a lay person and a practitioner looking for elements that are essential to the Jesuit identity of a community service organisation.

In Chapter 7, ‘Action’, I bring the findings across three sources of knowledge – personal, Ignatian and Jesuit – into dialogue with each other. I refine and distil the considerable amount of material that emerged from Chapters 5 and 6, incorporating it into the model I present in order to achieve my research aim. In articulating this model, I take account of the Jesuit and community sector contexts, and the knowledge context of the organisational identity field. I also outline how the model can be adapted for use by others in the community sector outside the Jesuit network.

In Chapter 8, ‘Evaluation’, I draw out and specify the new findings related to knowledge and practice that emerged in Chapter 7 – for the Jesuits, for the community sector and for the organisational identity field. I then identify the study’s contribution to research methodology. I point to potential limitations of the study and indicate how I attempted to manage these. Finally, I suggest areas for further research emanating from my study.

CHAPTER 2

Methodology

My research aim is to articulate a model for fostering the Jesuit identity of a community service organisation in a contemporary context. The secondary research aim that sits beneath this, and which must first be addressed, is to identify the elements and features of Jesuit heritage that speak to Jesuit identity of a community service organisation.

In this chapter, I position myself in relation to the research and elaborate on how I came to choose an autoethnographic methodological approach. I discuss this methodology, including current debates and concerns about benefits, limitations and ethics associated with this methodology. I introduce the Ignatian Pedagogical Paradigm and discuss how I adapted the paradigm and used it to shape my research design and the structure of my thesis. I also discuss my method and treatment of data.

Positioning Myself

It is important for researchers to situate themselves in relation to their research from the outset 'to allow readers to understand their position' (Creswell & Miller, 2000, p. 127). Building in ongoing opportunities for reflexivity, where researchers reflect on various factors that influence them and the meaning they ascribe to their experiences, is also critically important to the integrity of the research (Creswell & Miller, 2000).

The subject of this study is not only a topic of personal interest; it is a vocational endeavour. By the time I was appointed CEO of Australian organisation Jesuit Social Services, I had already dedicated more than twenty years to the pursuit of social justice and fostering my spiritual life, and these became the building blocks for the task of the next sixteen years of leading the organisation. As a Christian, a Catholic and a social worker striving to live and work in accord with my beliefs and values, I had spent many years in close relationship with people on society's margins and endeavouring to bring about social change. Through this experience, I had come to value good practice and had formed some clear opinions about its features. Through holding leadership roles in organisations and community groups, I had gained some insights into the nature of good leadership and how to foster it at personal and team levels. I had been influenced by the Jesuits over a number of decades (though much of this had gone unrecognised by me).

When I took on the role of CEO, I drew on these various strands, adapting and applying them and bringing them together with experiences and lessons emerging from

the new context. The latter provided me with opportunities to deepen my exploration of Ignatian spirituality; to participate in seminars, conferences and courses that provided intellectual formation in Jesuit heritage; and to form relationships with colleagues in the broader Jesuit enterprise. A key part of this work involved intuiting elements from Jesuit heritage and then translating and embedding them across all activity through an organisational framework I developed. This process enabled me to foster the Jesuit identity of Jesuit Social Services and I came to see the value of Jesuit heritage in inspiring, guiding and sustaining the organisation. For this reason, I have long wanted to further develop and articulate a model for fostering the Jesuit identity of a community service organisation.

I examined various methodologies such as case-study and document analysis. None felt comprehensive in its scope. Then it dawned on me. I realised that I am an 'insider' in relation to the matters I want to research. Pelias (2011) says research 'insiders' claim to 'share cultural membership with the group under investigation' (p. 662), and to some extent, this reflects my position not only in relation to Jesuit Social Services, but also to the Jesuits. I come to this task from the 'inside' not only in terms of being immersed in the daily activity of leading a community sector organisation and engaging with Jesuit heritage and applying it in my work, but also as a practitioner of Ignatian spirituality that sits at the heart of Jesuit identity. I have been shaped by this heritage throughout most of my life: I was born into a Jesuit parish; from my early twenties I began in earnest my quest to live authentically – in an intentional, grass roots community – and that experiment brought me into contact with some Jesuits on a similar path, doing eight-day silent retreats annually, having a Jesuit spiritual director.

All these experiences are in my mind, my heart, my body, my soul. I carry them. I'm inspired by them, I'm scarred by them, I'm changed by them. I sought a methodological approach that would allow me to include personal material that I could draw on to uncover, tease out and shed light on my topic. While they are not the focus of this research, I acknowledge that I have been shaped by numerous other experiences and bodies of knowledge – for example, as mother, wife, aunt and friend.

As a researcher, I am first a practitioner – of Ignatian spirituality, leadership, and social work. I am a laywoman leading an Australian Jesuit organisation and I play a leadership role in the Jesuits' international social justice enterprise. As such, I have effectively moved from being an employee to a position of exerting some level of leadership and influence within the social apostolate of the Jesuits' global endeavours. Therefore, in pursuing my research aim I am speaking from inside my experience and

growing understanding of Ignatian spirituality, of faith more generally, and Jesuit ethos – and, ultimately, of what constitutes Jesuit identity in the context of a community service organisation today.

This study has also opened other understandings. As I came to see more deeply my 'insider' status within the Jesuit enterprise, I also came to see my 'outsider' status. I am not, after all, male, a Jesuit, or religiously qualified. This status as both 'insider' and 'outsider' is consistent with the view that these terms 'are not definitive and should rather be considered as fluctuating, shifting, and as part of a continuum' (Finefter-Rosenbluh, 2017, p. 1; Mercer, 2007). I have lived experience of the challenges of being an 'outsider' including the regular and probably inevitable reminder about whose realities are privileged. Yet I have also observed that this 'outsider' status has given me a particular vantage point from which to view, understand and translate the living heritage of which I am also an 'insider'. The joys and sufferings of being both an 'insider' and 'outsider' allow me to benefit, in some ways, from both worlds. As Mercer (2007) has argued, 'the more we conceive of them as points on a continuum, the more we are likely to value them both, recognising their potential strengths and weaknesses' (p. 7).

I have reflected that part of my role as CEO is to make Jesuit heritage contemporary, accessible and useful, especially for staff living and working in the context of a Jesuit organisation. I aim to democratise it – to address the power imbalance that exists where a group of 'insiders' hold the key to the treasure box of this heritage. I have often commented that I do a 'double translation': first, translating the Ignatian and Jesuit story so it can be readily engaged with by staff; second, translating that engaging story into what it means for the organisation and its members, for our organisational identity and purpose, and for what we do and how we do it.

Researchers seeking to gain insight into how people make meaning of their experiences are drawn to qualitative research approaches (Hickson, 2015). As such, I knew from the outset that I would adopt a qualitative design for my research. Qualitative researchers, according to Denzin and Lincoln (1994), 'study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meaning people bring to them' (p. 2). This resonates with my interest in incorporating real life experience, making sense of that experience and articulating lessons learned in the process. This approach also aligns with my desire to 'discover rather than test variables' (Corbin & Strauss 2008, p. 12) as I embark on a process of delving more deeply into personal, Ignatian and Jesuit sources of material. In my search for a methodology that

would allow me to acknowledge, explicitly draw on, and honour my experiences, I came across autoethnography.

Autoethnography

According to Doloriert and Sambrook (2012), the term *autoethnography* first appeared in the literature in the 1970s, with Hayano (1979) identified as being the first scholar to publish the term in 1979. According to Ellis and Bochner (2000), there have been numerous studies using personal narrative before and since that time, which, while not using the term autoethnography, could be subsumed into this category. They provide the following definition: 'Autoethnographies are autobiographies that self-consciously explore the interplay of the introspective, personally engaged self with the cultural descriptions mediated through language, history, and ethnographic explanation' (Ellis & Bochner, 2000, p. 742). Doloriert and Sambrook (2012) state that the way the term *autoethnography* has been presented over time reflects an evolving understanding and shifting focus of this methodology. They suggest that *auto-ethnography*, used by Hayano (1979), reflects the focus on *ethno*, with the prefix *auto* suggesting the introduction of input from the self; that the term *auto/ethnography*, used by Reed-Danahay (1997), reflects 'a closer and mutually dependent relationship' (Doloriert & Sambrook, 2012, p. 84) between auto and ethno; and that the term *autoethnography*, used by Ellis and Bochner (2000), speaks to their approach of prioritising the *auto* component (Doloriert & Sambrook, 2012). They state that this latter approach has become the most commonly used, particularly for those scholars who privilege emotive autoethnographies. They note, however, that researchers continue to employ a variety of combinations of auto/ethno focus, which can be expressed along a continuum, with the researcher being less or more the focus of the research (Doloriert & Sambrook, 2009).

Strong interest in autoethnography as a method of inquiry emerged in the 1990s, in part as a response to growing concerns about the limitations of social science, including its claims to objective findings of facts and truths (Ellis, Adams, & Bochner, 2011). Witkin (2014b) argues that postmodernism and the changing social context paved the way for 'alternative understandings of knowledge and innovative approaches to inquiry' (p. xi). Feminists and other social constructionist researchers questioned positivist claims to objectivity within the social sciences, insisting on the value of 'personal narratives, experiences and opinions' in qualitative research (Méndez, 2013, p. 280). In the social sciences, feminist approaches prioritise experience (Ellis, 2004) and bring to the fore questions about knowledge: 'Whose knowledges? Where and how

obtained, by whom, from whom, and for what purposes?' (Olesen, 2011, p. 129). These are questions that reflexively acknowledge the researcher's own situated contribution to the generation, collection, organisation and interpretation of the data. Reflexivity is the 'active acknowledgement' that the researcher's 'own actions and decisions will inevitably impact upon the meaning and context of the experience under investigation' (Horsburgh, 2003, p. 308). Lietz, Langer and Furman (2006) contrast this with attempts to 'hide behind a false sense of objectivity' in research (p. 447). Poststructuralist deconstructionist feminists make the case for the use of non-traditional data, or 'transgressive data' (St Pierre, 1997, p. 180), because knowledge itself, and the claims to possess it, are implicated in the maintenance of social hierarchies of gender, race, sexuality, class, and ability. In other words, knowledge legitimised in the academy reproduces power dynamics that work to invalidate the knowledges of those who are on the margins of the academic institution, such as women and people of colour, who have historically been the objects, rather than the subjects, of academic study (Olesen, 2011). Autoethnography, then, enables the researcher not only to reflect on their own process of research, but also to assert the authority of their own experience.

An autoethnographic approach allows me to privilege my own experience in the field of social work in order to do justice to the ethical demands that stories make of us to act. As Bochner (2001) suggests, stories require us to listen to them, and, in that sense, narrative ethnography is a moral exercise. Paying attention to personal narratives obliges us to be respectful of lived realities and to be ethically invested in the effects of our research. Autoethnography, as Wall (2006) writes, moves social science 'beyond a focus on method, toward the power of social research to have a moral effect' (p. 148). Bochner (2001) has argued that the great strength of personal narrative, for the social sciences, is its capacity to represent the 'conflicts, difficulties, and moral contradictions' (p. 140) that we face in our everyday lives. By engaging with experience 'as a moral discourse' (Bochner, 2001, p. 140), autoethnography allows us to access and share 'unique, subjective, and evocative stories of experience that contribute to our understanding of the social world' and to 'reflect on what could be different because of what we have learned' (Wall, 2006, p. 148). The rise of autoethnography as a legitimate mode of inquiry has shed light on the social qualities of the research process itself and its capacity to act upon the world as a driver of change, and not just to describe it.

Ellis et al. (2011) describe autoethnography as a process and a product. As a process, autoethnography analyses experiences in the light of relevant theory and literature, with an eye to 'making characteristics of a culture familiar for insiders and

outsiders' (Ellis et al., 2011, p. 276). As a product, autoethnography aims to be aesthetically pleasing and emotionally evocative, attracting the reader to the text, drawing out the meaning of the researcher's experience, providing compelling insight into the cultural experience or social context, and making the research accessible to a wide readership (Ellis et al., 2011). In this thesis, I aim to bring the reader with me as I explore experiences in a way that endeavours to open up the meaning of Jesuit heritage and its relationship to organisational identity with the goal of broader application. When sharing deeply meaningful experiences I view as pertinent to my topic, especially those of a spiritual nature, I remain highly aware of the challenge of rendering these accessible.

Autoethnography has also been applied in organisational settings (Sambrook & Herrmann, 2018) because these, too, are 'cultures' of a sort: work cultures, power structures and processes of behavioural change within organisations are also subject to ethnographic investigation, critique and transformation (Herrmann, 2017). As with the broader societies within which they are located, organisations are not static entities (nouns) but are always in the process of *organising* (verbs): that is, of being 'created, constructed, maintained, and changed … as people attempt to solve problems and make sense of themselves and their surroundings' (Herrmann, 2017, p. 8).

While my research methodology overlaps with organisational autoethnography in that I draw heavily on my experience within Jesuit Social Services, it differs from it in a number of ways: I am not undertaking an autoethnography of the organisation per se, nor of my experience within it; I draw on a broad range of personal and organisational experiences beyond Jesuit Social Services. These wider considerations have been included because they contribute to the research aim by shedding light on what Jesuit identity is and how it can be cultivated in an organisational setting.

Key Methodological Issues

Scholars note that researchers writing autoethnographies differ in the focus they put on the various components of *auto* (self), *ethno* (link to culture) and *graphy* (the research process), which results in different products (Ellis & Bochner, 2000). A major debate in the field regarding autoethnography is where along the 'emotive-analytic' continuum autoethnographies should be located (Anderson, 2006). The former uses an evocative writing style that highlights personal insight, struggle and meaning-making (Bochner & Ellis, 2006); the latter uses a more traditional approach that is more theoretical, less self-focused and emphasises the use of self in relationship to context or culture (Anderson, 2006).

This thesis seeks to bridge the gap between experience and analysis by adopting a structured process that provides a systematic way to approach the data. To this end, I use the Ignatian Pedagogical Paradigm (see Research Design section, this chapter) to bring order to my experience to make it legible within an analytic framework compatible with my professional role in a Jesuit organisation. As with autoethnographic research, a Jesuit approach honours personal experience while valuing the intellectual apostolate and 'learned ministry' (Society of Jesus, 1995/2009d, p. 662, d. 26, paras 18–20). In keeping with this, I present the autobiographical data alongside key documents from Ignatian and Jesuit heritage and relevant literature from organisational identity studies. With a solid grasp of these bodies of knowledge, I draw on my experience to identify key points relevant to my topic, to identify and address gaps in knowledge and practice, and to enrich the model I articulate.

Because it is grounded in personal experience, autoethnography has faced criticism relating to its 'systematicity and methodological rigour' and its 'credibility, dependability, and trustworthiness' (Wall, 2006, p. 155). These criteria, however, are more appropriate to the hard sciences and quantitative, rather than qualitative, research. It has been argued that autoethnography should not be assessed using conventional criteria, given that it is underpinned by 'different ontological and epistemological assumptions' (Sparkes, 2000, p. 29). Witkin (2014a), for example, suggests that 'alternative concepts such as authenticity and verisimilitude are more relevant' (p. 15). Méndez (2013) notes differing views regarding limitations associated with drawing conclusions from one person's story. My own position, reinforced by my experience as a social worker, is that processes that take account of people's experience in the light of their personal and social context are valuable. Harrison (2014) argues that as social workers have a prized seat at the table of human drama, we waste this opportunity if we remain at the superficial level of understanding such experiences. He exhorts social workers to 'carry observations into realms of memory, context, imagination, and the shared experience of relationship' (Harrison, 2014, p. ix). This informed my approach, encouraging me to examine some of the most powerful, significant and poignant experiences in my own life (Krizek, 2003), including spiritual experiences. This process helped me access and make explicit 'tacit understandings' (Duncan, 2004, p. 37) to better understand the values and beliefs that underpin my social work practice. In my view, this approach is supported by a Jesuit understanding of the significance of the interior life as the starting point for understanding and discernment.

In using this material, however, I faced the challenge of how to present nebulous, ill-defined experiences 'without translating the text into inaccessible jargon' (Witkin, 2014a, p. 13). At times the challenge seemed so big that I considered excluding material of a deeply personal and spiritual nature, but ultimately chose to include some of this material given the significant role it played in helping me to identify new knowledge relevant to my research topic. I was drawn to autoethnography because of a sense of personal 'fit' – it supports my honouring of the interior life, my valuing of narrative approaches in work and life, and my appreciation of social and cultural context. It aligns with social work goals, feminism and Ignatian spirituality, all of which are important to me.

Importantly, autoethnography has a political, and moral, role in furthering the pursuit of social justice. It was attractive to me for this reason and throughout the research process I kept my eye on this goal. It acknowledges that 'the personal is political' and allows for the interrogation of 'larger cultural interpretations, grand narratives, and hegemonic discourses' (Herrmann, 2017, p. 2). By linking the personal and political, autoethnography addresses the criticism that personal reflections by their nature are limited to a focus on self (Olesen, 2011). Autoethnography democratises knowledge, providing a space where marginalised voices can be heard 'in a tension with dominant expressions of discursive power' (Neumann, 1996, p. 189). This is relevant to my study, given that I endeavour to break open new knowledge and practice in the context of a male religious order of the Catholic Church.

Autoethnography provides me with the opportunity to privilege my own knowledge and experience of Jesuit heritage. This aligns with a feminist approach, which looks to elevate a range of voices, ensuring they are heard and included. Despite the formative influence of significant Ignatian spirituality on my thinking, I was conscious of having no formal education or training in theology or religious studies. Autoethnography allows me to honour my experience and to privilege insights and lessons obtained through informal channels, lived experience, and prayer and contemplation.

Autoethnography also aligns with an Ignatian approach, which encourages starting with one's own experience and reflecting on it in its context to uncover the deeper meaning and tacit knowledge held there, and, ultimately, to move to enact new insights and knowledge in the pursuit of social justice ('Ignatian Pedagogy – A Practical Approach', 1993/2017). In the years I have led Jesuit Social Services, I have been guided by this approach. I decided to formalise and embed it within my research by adapting the Ignatian Pedagogical Paradigm. In addition to treating my data in accord with this

approach as outlined in the Method section, I used this paradigm to shape the overall approach to my thesis. By using it in association with an autoethnographic methodology, I have created continuity between me as practitioner and me as researcher.

Research Design: The Ignatian Pedagogical Paradigm

In choosing my research design, I looked for an approach that supported Chang's (2008) suggestion about how to treat the three dimensions of auto, ethno and graphy when using an autoethnographic methodology. She proposes that 'autoethnography should be ethnographic in its methodological orientation, cultural in its interpretive orientation, and autobiographical in its content orientation' (Chang, 2008, p. 48). I developed a research design that supports this direction, adapting the Ignatian Pedagogical Paradigm to guide the stages of my research and also to provide an analytic framework and process to present the data.

The Ignatian Pedagogical Paradigm is one of the Society of Jesus's three official documents on education. The first was the 'Ratio atque institutio studiorum Societatis Iesu', or the 'Plan and organisation of the studies in the Society of Jesus' ('Ratio Studiorum', 1599/2017), 'to ensure high standards and uniform practices in Jesuit schools in different parts of the world' (O'Malley, 2016, p. 159). In 1980 the Society developed a commission to examine the distinctive characteristics of Ignatian pedagogy. It produced a document titled the 'Characteristics of Jesuit Education' (International Commission on the Apostolate of Jesuit Education, 1986) to refresh the 'Ratio Studiorum' ('Ratio Studiorum', 1599/2017) and provide clarity about the distinct nature of Jesuit education. In 1993 the Society published the Ignatian Pedagogical Paradigm, which 'unpacks the pedagogical style required by the *Characteristics of Jesuit Education*' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 367). Its primary purpose was to assist educators to teach in accord with the purposes of Jesuit education, though it was also conceived as a tool that could 'be helpful in every form of educational service that in one way or another is inspired by the experience of St Ignatius' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 369). While the paradigm was originally developed for use in educational settings, I have applied it to my work practice, from strategic planning through to design of program and advocacy interventions. The paradigm is a tool comprising components central to a Jesuit approach in the world, thereby lending itself to broad application beyond the education sphere. In this research I adapted it to help structure my thesis overall and, within that, to guide my data gathering, analysis and interpretation. The paradigm comprises five non-linear,

overlapping components: context, experience, reflection, action, evaluation. Each of the five components has a particular meaning.

It is important to note that I use the paradigm in two capacities. First, I use it to structure the entire thesis, organising my chapters according to the components. Second, I use the paradigm as guiding framework to deal with the data within my autoethnographic chapter (Chapter 5). Figure 1 depicts my dual use of the Ignatian Pedagogical Paradigm. I now turn to the application of the Ignatian Pedagogical Paradigm and how it relates to the structure of the entire thesis, organising my chapters according to the components.

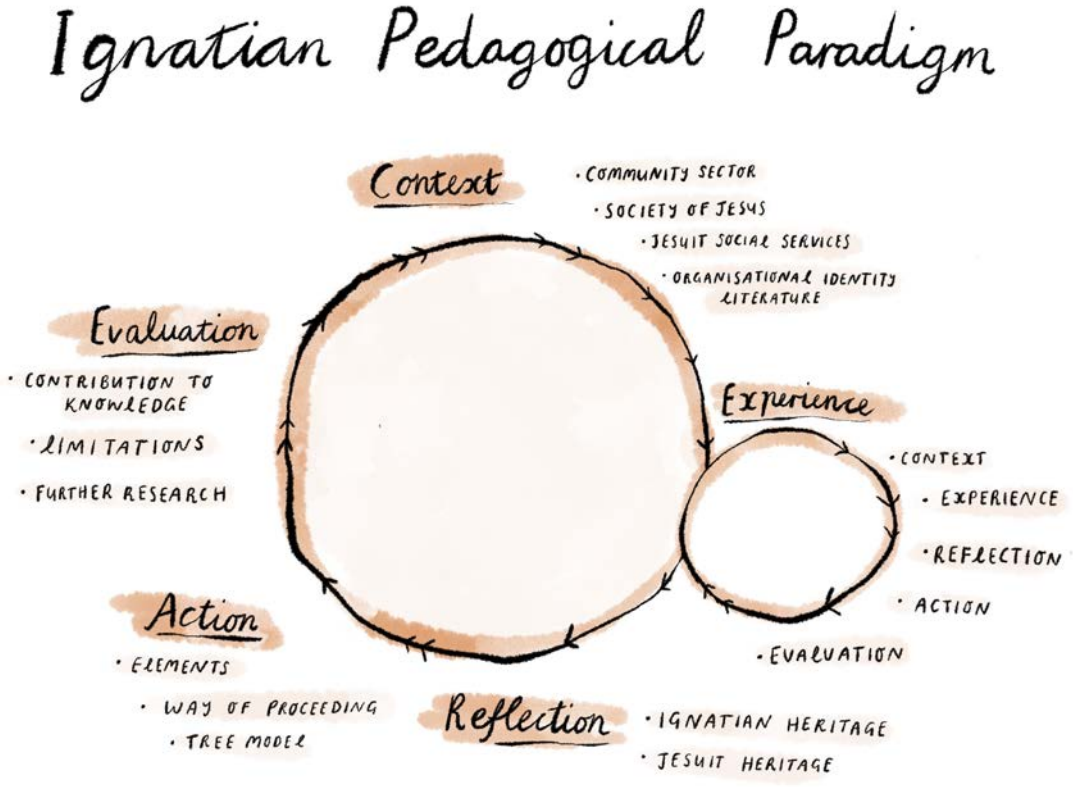

Figure 2.1 Application of the Ignatian Pedagogical Paradigm

Context (Chapters 3 and 4)

While the experience/reflection/action dynamic is at the heart of this paradigm, it is acknowledged that giving consideration first to the context and circumstances in which events or experiences occur is of critical importance ('Ignatian Pedagogy – A Practical Approach', 1993/2017, pp. 382–383, paras 40–42). Understanding context assists in making meaning of experiences and enhances the value and effectiveness of ensuing action. The Ignatian concept of context forms the basis of Chapter 3 ('Operating

Context') and Chapter 4 'Literature Review'. There are a number of elements that make up the context of my study: first, the community sector in Australia provides the secular institutional context; second, the Jesuits, including their founder Ignatius of Loyola, provide the religious institutional context; third, Jesuit Social Services provides the immediate operating context; and fourth, the literature review of scholarship on organisational identity provides the theoretical context. With these aspects of the context clearly articulated, the next step is to consider what experience is telling us.

Experience (Chapter 5)

This component goes beyond simply relaying information about events or experiences and grasping these intellectually; rather, experience refers to the engagement of 'the whole person – mind, heart, and will' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 383, para. 44), which is understood to be a critical step motivating the person to take action. Using autoethnography, I gather and analyse data from my work and life experience to shed light on Jesuit identity by tracing the antecedents to elements I currently use to foster this; to demonstrate how these translate to a community service setting; and to provide insights into my lived experience of fostering this identity in an organisation. Within this particular chapter, as a means of deepening my understanding of these experiences, I draw again on the dynamic of the paradigm to guide my treatment of the data.

Reflection (Chapter 6)

In this component, I engage 'the memory, the understanding, the imagination and the feelings' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 386, para. 49) as a process that allows meaning to emerge from experience and identifies relationships between different aspects of knowledge. Reflection is 'a thoughtful re-consideration of some subject matter, experience, idea, purpose, or spontaneous reaction, in order to grasp its significance more fully' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 386, para. 51). Its purpose is to liberate the person to take action. In this chapter, I reflectively review Ignatian and Jesuit sources and key literature. Throughout my life, I have been immersed in Ignatian and Jesuit heritage without always being conscious of this. In the course of my work, I intuited key features of its essence and applied these in order to foster Jesuit organisational identity. My research affords me an opportunity to dig deeply and purposefully into this heritage in order to identify elements that speak to Jesuit identity as it pertains to a community service organisation. I do this from my

personal perspective as a layperson, social worker, leader of a Jesuit organisation and practitioner of Ignatian spirituality.

Action (Chapter 7)

Ignatius said 'love ought to find its expression in deeds more than words' (Ignatius of Loyola, n.d./1996g, p. 329, para. 230). While the central process of the Ignatian Pedagogical Paradigm paradigm is discernment, its final purpose is action; not simply activity, but considered action for a greater purpose. In the thesis, therefore, the process of considering context, experience and reflection must lead to action. First, I present findings from the three sources of material – personal (from Chapter 5) and Ignatian and Jesuit (from Chapter 6) – and bring them into dialogue with each other in order to distil the features that inform my model. I reflect on these in the light of key considerations identified in the Literature Review, mindful of the operating context of the community sector. The findings from the analysis of the literature, of my experience, and my reflection on Ignatian and Jesuit heritage inform the next stage where I present an updated list of six elements reflective of Jesuit identity when applied to a community service organisation; a framework to operationalise these; a dynamic model for fostering organisational identity, specifically Jesuit identity in a community service organisation in a contemporary context; and a schema that articulates the relationship between these various components.

Evaluation (Chapter 8)

The final component is evaluation, which is understood as an opportunity to stand back and note overall progress towards the desired goal of 'fuller human growth' ('Ignatian Pedagogy – A Practical Approach', 1993/2017, p. 391, para. 69). This includes recognising opportunities for further development. In this thesis, this stage is an opportunity to provide an assessment of what new knowledge is generated by the research, and what matters are emerging that require further study.

Method

My method involved undertaking a process of systematic and reflective review of my work and life experiences. In autoethnography, one's personal memory is valued as a primary source of material, though, as Chang (2008) suggests, relying solely on memory as the source of data may be a problem, in that 'memory selects, shapes, limits, and distorts the past' (p. 72). I am fortunate that I had access to a large amount of written

personal material that I had amassed over more than four-and-a-half decades. I use this to recall and clarify memories, events and experiences. Rather than attempting the impossible task of accurately retelling past experiences, which will inevitably be 'an interpretation of an interpreted experience', I aim instead to 'capture the essence of an event' (Witkin, 2014a, p. 11).

Approaching the Data

Chang (2008) claims that one of the benefits of autoethnography is that it is user-friendly. This was my experience in relation to access to data. My personal data includes personal diaries and writings, retreat notes, letters, songs and photos, spanning 45 years. The thesis relies on a retrospective analysis of this extensive body of data sources from my life. Figure 2.2 shows a selection of diaries and notebooks that make up the dataset.

Figure 2.2

I first examined the full data set in order to identify in broad terms what documents I would return to. This first reading allowed me to set aside material that was not pertinent to my topic or that I would not draw on directly. Some material in the latter category was useful in setting the context for a particular period in time: for example, a letter from a community member discussing a current issue or concern. At the end of this phase, I was left with a body of material comprising 36 diaries of different sizes, 15 notebooks, two articles and 24 letters (Table 1), comprising approximately 670,000 words. This was all hand-written material apart from two pieces of writing that had been

published. The diaries are personal diaries that I wrote in regularly, either on a daily, weekly or monthly basis, reflecting on events and experiences. The notebooks, which I generally carried with me, were used to jot down new and emerging ideas, to take notes when I attended talks or meetings relevant to my subject matter and to work through and formalise my thinking. The letters were to my family and community members. The articles relevant to my subject matter were published in a textbook and a book of essays.

I then read through this documentation systematically, line by line, to identify specific material relevant to my research question. This was a discernment process that involved paying attention to when and how my heart was moved as I revisited this material. In this phase, I employed a number of simple strategies to highlight passages for closer analysis and reflection that I would return to: for example, I used yellow sticky notes to mark relevant pages, sometimes highlighting particular lines.

Table 1. Data from personal sources

Chronology	**Sources (incl. approximate word count)**				
	Diary	**Notebooks**	**Articles**	**Letters**	**TOTAL**
India **1975**	3 diaries 120,000 w	n/a	n/a	24 letters 50,000 w	170,000 w
***Hesed* Community** **1976–1991**	11 diaries 150,000 w	7 notebooks 30,000 w	2 articles 6,000 w	18 letters 10,000 w	196,000 w
Transitioning to professional life **1991–2001**	4 diaries 60,000 w	n/a	n/a	n/a	60,000 w
2001–2004 **Arriving at Jesuit Social Services**	4 diaries 12,000 w	4 notebooks 2,000 w	n/a	n/a	14,000 w
Arriving as CEO **2004–2008**	2 diaries 30,000 w	n/a	n/a	n/a	30,000 w
Going deeper, going broader **2008–2020**	12 diaries 100,000 w	4 notebooks 100,000 w	n/a	n/a	200,000 w

On the next reading of my documents, I began to fine-tune my search and categorise material according to my existing knowledge whose origins I was looking to trace in my earlier life. I also noted significant experiences, insights or stories that did not seem to fall into one of the categories of existing knowledge, but which I knew had been a formative experience (for example, spiritual insights, encounters with injustice). I used different colour sticky notes to distinguish the various topics.

In the next phase, I reviewed the material I had identified, recording key words, phrases, reflections and anecdotes that I anticipated using – either as direct quotes or to

fill out a memory. Sometimes I transcribed sections into new notebooks as a way of further reflecting on the material; if I thought I might use the excerpt as a direct quote I typed up this material and saved it in a document for later use; if the material was lengthy, I took a photo of the page, also storing it for later use.

Much of this material is what Chang (2008) refers to as 'self-observational and self-reflective data' (p. 89). In addition, I reviewed work diaries, reports I wrote to the Board of Jesuit Social Services, and publicly available documents such as annual reports and quarterly newsletters. The twenty reports to the board following international visits to Jesuit social ministries and meetings, especially in the latter part of my autoethnography, were instructive and it is these reports that I specifically draw on in my autoethnographic chapter. I used the same process outlined above in relation to this material.

Structuring the Data

Once I had collected the relevant materials, I needed to organise them. I first broke down the data into chronological 'Phases' and 'Acts'. I reviewed this material with an eye to identify both the antecedents of my existing knowledge and new knowledge relevant to my research aim. I then used the Ignatian Pedagogical Paradigm to guide and shape the analysis. This process is shown in Figure 2.3.

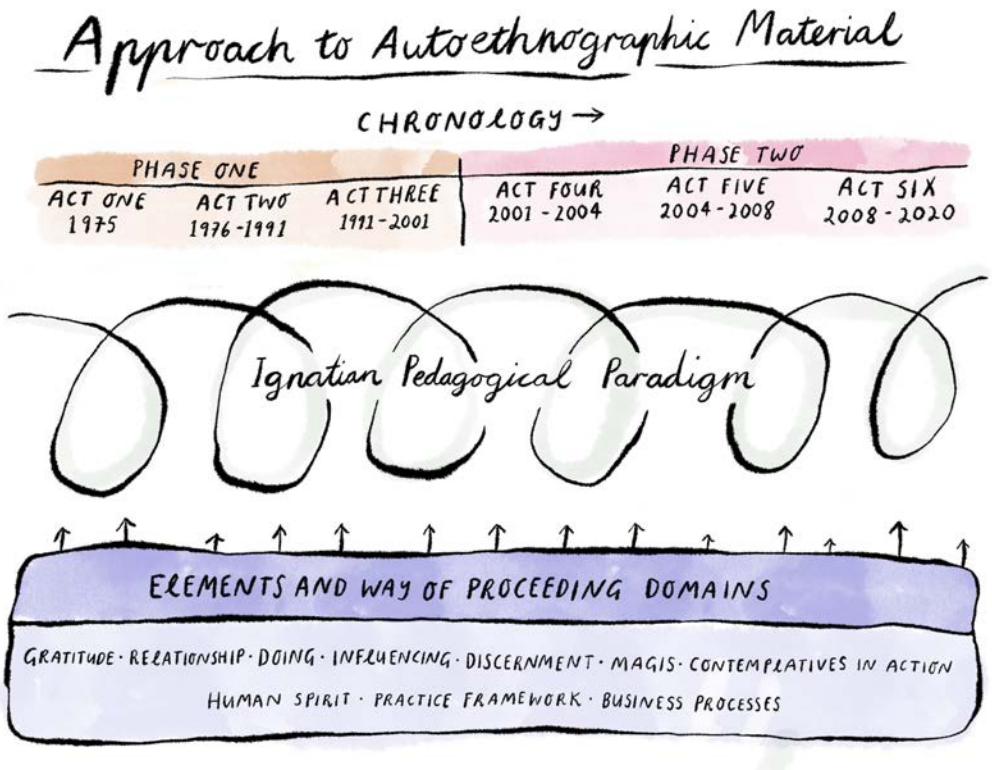

Figure 2.3 Approach to personal data

In the first instance, I approached the task of reviewing my personal material chronologically, examining particular periods in my life in order to identify experiences, insights and lessons in line with my research aim. Within this chronological approach I did not restrict myself to using time periods of similar length. Rather, it was clear that certain experiences relevant to my research topic provided natural demarcation points for me to establish phases and stages as a basis to segment my autoethnography. They represent periods of time ranging from eight months to sixteen years.

Within the chronological approach, I chose to arrange my material into two Phases: a period of my life prior to working at Jesuit Social Services; and the period of my life working at Jesuit Social Services. Within each Phase, there are three Acts (sections) reflecting significant experiences and periods of learning. Within each Act, there are a number of 'Scenes' (topics) that highlight particular insights or lessons relevant to my research aim.

Phase One

Act One: India

Act Two: *Hesed* community

Act Three: Transitioning to professional life

Phase Two

Act Four: Arriving at Jesuit Social Services

Act Five: Becoming CEO

Act Six: Going deeper, going broader

As outlined in Chapter 1, I did not start the exercise of articulating a model for fostering the Jesuit identity of a community service organisation from scratch. In the course of my work, I had already identified seven central elements from Jesuit heritage and had developed a framework to operationalise these. In reviewing my data, I was attuned to these, seeking to trace their origins and fill out their meaning. The seven elements are Gratitude; Relationship; Doing; Influencing; Discernment; *Magis*; and Contemplatives in Action (see Figure 2.3). I named the framework *Way of Proceeding*, drawing on a term from Jesuit lexicon, which I elaborate on in Chapter 3. It comprises three domains: Human Spirit, Practice Framework, and Business Processes (see Figure 2.3). I was mindful of undertaking this exercise not to justify my existing understanding, but to guide my review of personal material in order to organise and *make sense* of the experience.

Finally, I used the Ignatian Pedagogical Paradigm (Context, Experience, Reflection, Action, Evaluation) to structure the autoethnographic narrative presented in Chapter 5. Each Phase and Act begins with an introductory context and concludes with an evaluation of that time period and reflects upon the meaning of the experience and the ethical action it prompted.

In the Context sections, I took account of various personal, social, cultural and other relevant features. Some factors that I considered included my age, development, health, and level of knowledge and experience; what assumptions, beliefs and values I brought to the situation; what social supports were in place; the physical conditions; customs and cultural behaviour within surrounding milieu; and cultural safety.

In the Experience sections, where I revisited key parts of my story, I brought an open, inquisitive mind and heart, noting the broader set of responses I had (including physical, emotional and spiritual). I was curious about these, and questioned how they aligned with the views or ideas I brought to the situation. I probed them for meaning, noting discrepancies and identifying new knowledge.

In the Reflection sections I used the reflection process to consider the essential meaning of experiences and my reactions to them at the time they occurred, and also from my current vantage point; and I explored how these related to other components of knowledge and experience. My goal was to provide a base from which to consider options for action in relation to my research aim.

I used the Action component of my autoethnography to identify the features arising from my reflection on experience that I brought forward to enact in the next period. These features contributed to the body of material that would inform my model.

The Evaluation sections provided me with an opportunity to take stock in relation to the elements and framework, to note emerging priorities, and to reflect on how my own understanding was developing.

Over the course of the autoethnography, the way I presented material changed, reflecting my developmental stage in the period under discussion and my evolving conceptual thinking and analysis in relation to the research topic. For example, in Act One, Phase One, I present material in short, sharp scenes; this reflects my youth and inexperience at that time, when particular events had a powerful impact or taught me an important foundational lesson. This contrasts with the final Act in Phase Two, where I present material in a way that is more consistent with my conceptual thinking relevant to my research aim.

Ethical Considerations

After examining the literature to identify ethical issues that I needed to consider in undertaking an autoethnography, I identified two concerns relevant to my research: the protection of the privacy and identity of the participants (individuals or organisations); and auto ethics related to my own identity as a researcher and the potential implications of public access and reader responses to autobiographical material (Doloriert & Sambrook, 2012). While a formal ethics approval from the Human Research Ethics Committee was not required, I was alert to Wall's (2016) reminder that others are implicated in my writing. I endeavoured to ensure privacy, confidentiality and anonymity by changing or omitting identifying details.

A number of scholars contend that the issue researchers most underestimate, however, is the ongoing implications of writing candidly about themselves and their experiences (Chang, 2008; Ellis, 2007; Wall, 2016). Witkin (2014a) notes that in bringing details of one's life into the public space, a certain degree of courage may be required by the researcher. I am aware that I have revealed aspects of myself personally and also aspects of myself as I occupy the role of CEO of Jesuit Social Services and that this might have organisational consequences. I have thought about how what I wrote might set me up for criticism from key stakeholders, including Jesuits and colleagues, and how others might respond to me once I have 'revealed' myself (Foster, McAllister, & O'Brien, 2005). I was mindful of the impact of such concerns, including how they might influence my choice or interpretation of experiences. I also reflected on what 'cultural baggage' (Foster, McAllister, & O'Brien, 2005, p. 2) I brought to the research experience (for example, my existing relationship with the Church and with the Jesuits).

I kept these matters under review throughout the data-gathering and analysis phases of the research, all the while keeping before me the purpose of my research. I reflected on if, and how, these concerns influenced what data I chose to include, the context I provided for this data, and the analysis and interpretation I offered. I managed this by continually reviewing the impact of either including or excluding data, motives for my decisions, and assessing the significance of any data to my research aim. I continued my regular practice of reflection and writing in my personal diary. I also discussed these matters regularly with my supervisors and, on occasion, with a trusted confidante to test my thinking and approach. Central to Ignatian spirituality is discernment to foster freedom, which further motivated me to sustain my contemplative practice throughout the research process.

Conclusion

In this chapter I outlined the methodological approach I have chosen in order to achieve my research aim: *to articulate a model for fostering the Jesuit identity of a community service organisation in a contemporary context.* By positioning myself in relation to the research, I provided a base from which to argue my choice of autoethnography. I examined the autoethnographic methodology, outlining how it allowed me to access and explore my experience in order to provide depth to my findings and best achieve my research aim. I introduced the Ignatian Pedagogical Paradigm, which serves two purposes in this study: first, it guides how I approach and reflect on my personal experience in my autoethnography, and second, it structures the entire thesis, embedding reflective processes at every point.

Having explained the paradigm's five components, I now move to enact the first component: Context. In Chapter 3, I spell out the operational context in relation to the community sector and the Jesuits, and in Chapter 4, I examine the knowledge context of the organisational identity field.

CHAPTER 3

Operating Context

This purpose of this chapter is to set the scene for this study. My research aim is to articulate a model for fostering the Jesuit identity of a community service organisation in a contemporary context. By spelling out significant features of that context relevant to my research, I point to the challenges that have influenced the model's development and foreshadow potential barriers to its implementation.

In my experience leading a Jesuit community service organisation, I bridge two worlds: the world of the Society of Jesus and the Australian community sector. From that vantage point, I perceive two separate challenges pertinent to my study. The first challenge pertains to the Society. I argue that its founder, Ignatius of Loyola, the order's founding documents and much of its history provide strong direction for the Society today to pursue more strongly the commitment to engagement with the poor and tackling injustice. Failing to do this is a direct threat to the order's mission of reconciliation and promotion of justice (Kolvenbach, 2000a). My research is set against this backdrop, including addressing questions raised by senior leaders in the social sector about what form and structure would allow the order to better fulfil this mission (Czerny, 2008; Kolvenbach, 2000a). Drawing on my experience, including listening to the views expressed to me by a number of Jesuits in the social sector, I maintain that robust community service organisations provide a way forward because a collective response is best suited to deal with many intractable social problems. These magnify individuals' efforts and ensure sustainable responses that outlive the interest or commitment of an individual Jesuit to a particular cause or need.

The second challenge pertains to the community sector. I argue that the dominance of neoliberalism continues to have a negative impact on the sector, eroding its purpose and its practice (Meekosha, Wannan, & Shuttleworth, 2016). Based on my experience of leading an organisation with a Jesuit identity, I argue that operating with such an identity can strengthen organisations to resist this trend and to better live their purpose. This underlines the importance of articulating a model for values-based organisational identity that agencies could adapt for their circumstances.

In this thesis, I bring the community sector and the Jesuits into dialogue with each other. This chapter sets the scene for my research by first visiting the world of the community sector in Australia and then the world of the Jesuits. In doing so, I first want

to acknowledge that while it is not the subject of this chapter or of my thesis, community and Church-based organisations in Australia and around the world have been responsible for, and complicit in, harm to people and communities. For example, Healy (2017) draws attention to the numerous abuses of human rights and poor practice, particularly in the field of child welfare, that have become the subject of a number of inquiries over recent decades. She references 'the forced removals of children, adoptions without consent, and the institutionalised abuse of children and young people' (Healy, 2017, p. 9). These policies and practices have been particularly devastating for Aboriginal people, families and communities (Australian Human Rights Commission, 1997). This includes the implementation of destructive government policies such as the forced removal of Aboriginal children from their families, the effects of which are being felt to the present period (Australian Human Rights Commission, 1997). More recently, the Royal Commission into Institutional Responses to Child Sexual Abuse (2017) identified the systemic failure of institutions, including many within the Catholic Church, to fulfil their duty of care to children. I do not address this history in my study, but draw attention to it here because any overview of the context of these worlds must acknowledge this reality. It is a reminder of the damage that can be done, and the care that needs to be taken, when intervening in others' lives. This history must inform any organisational model espousing Jesuit identity, ensuring that people's dignity and safety are prioritised.

The Community Sector in Australia

Jesuit Social Services operates as part of the community sector in Australia. I will briefly examine the history of this sector in Australia, with a focus on faith-based organisations. I argue that community service organisations are challenged to operate according to their purpose and founding values in the current environment, particularly due to the impact of neoliberalism. In this section, I trace how evolving ideological underpinnings have impacted the community sector and service delivery to today.

From the time of the invasion and subsequent white settlement of Australia, the community sector has played a key role in delivering services. Churches and religious organisations were central to this (Camilleri & Winkworth, 2005; Mendes, 2017). By the late nineteenth century, a number of Church-based organisations provided direct services to people in precarious circumstances, with a focus on responding to the needs of the 'deserving poor', including orphans, children of single mothers, and children who lived in poverty (Cleary, 2012; Winkworth & Camilleri, 2004). During this era, the main mode of intervention by Church-based and other community service organisations was direct

service provision, rather than intervening at the level of state policy (Mendes, 2017). By the late nineteenth century, however, both in churches and beyond, there was a growing understanding that broader social and economic factors, not personal failings, drove poverty (Camilleri & Winkworth, 2005).

Social work, whose origins date back to the nineteenth century, was contending with similar issues. In both England and North America, there was a contest of ideas and practice regarding social work's focus. On the one hand, it was characterised by the endeavours of individuals and charities to ameliorate the suffering of the poor (Abram & Allen, 2010; Abramovitz, 1998; Morris 2002); on the other hand, social justice was considered an integral element of social work from the outset, becoming a central focus from the early 1900s (Abramovitz, 1998; Morris, 2002).

In line with these developments, in the years following the Depression of the 1930s, a number of Australian Church organisations strengthened their critique of social policy (Camilleri & Winkworth, 2005). In the postwar period from 1945 and into the 1960s, organisations also began to advocate for long-term social policies aimed at promoting social justice (Cleary, 2012). Intergenerational poverty and place-based disadvantage became an acceptable frame within which to understand personal issues, struggles and marginalisation (Cleary, 2012). Cleary (2012) notes that this era was further characterised by the rapid growth of Church-based organisations while, concurrently, formal participation in churches was diminishing. Increasing professionalisation of services raised concerns that organisations were losing their mission-based identity; it also strengthened the sector, as professional staff brought skills from across various disciplines and challenged accepted practices. They brought a perspective to the work that largely resonated with traditional religious values, but which was more likely to be articulated in human rights terminology. Over time, as these staff increasingly took up leadership roles in Church-based organisations, decision-making shifted away from religious personnel (Cleary, 2012).

The Whitlam era in Australia (1972–1975) heralded significant and broad social change. As funding was directed to community organisations, practitioners' focus shifted to more strongly include empowering people and local community groups (Meekosha, Wannan, & Shuttleworth, 2016). At the same time, however, the economic downturn of the 1970s brought high inflation and unemployment across many Western economies, prompting political leaders to look for solutions in policies that favoured the free market unconstrained by the state. This signified a significant shift to neoliberalism, politically and economically (Caplan & Ricciardelli, 2016). Neoliberalism is characterised by 'small

government, free markets and limited social expenditure' (Mendes, 2017, p. 17). Numerous scholars argue this has shaped the contemporary welfare state (Caplan & Ricciardelli, 2016; Dalton & Butcher, 2014; Howe & Howe, 2012; Onyx, Cham, & Dalton, 2016; Roussy & Livingstone, 2018). Australia fell in line with this shift to neoliberalism and its social policy objectives were redefined, with those most in need bearing the brunt of these changes (Deeming, 2014).

Successive Australian governments adopted and embedded neoliberal principles and practices across the broad array of government economic and social policy portfolios, which has seen service delivery increasingly outsourced to the community and for-profit sectors (Khoury, 2015; Meagher & Goodwin, 2015; Mendes, 2017). This has been characterised as 'the most important and most radical change to state-society relations since the advent of the modern welfare state' (Considine, 2003, p. 63).

In the provision of social services, Australia operates with a mixed economy model involving the state, community sector and market. The degree to which one or other has dominated has varied over time (Meagher & Goodwin, 2015) according to the flux of political pressures (Considine, 2003). In particular, the adoption of neoliberalism has driven the growth of the market sector. This has broad-ranging effects, not only on social policy but on community fabric more broadly, given that each sector is underpinned by its own institutional logic, associated source of legitimacy, authority and norms (Meagher & Goodwin, 2015). For example, in the neoliberal paradigm, people are seen in terms of their contribution to the market as consumers, customers, or taxpayers, rather than as citizens with democratic rights and associated responsibilities including for the broader wellbeing of society (Marston, Cowling, & Bielefeld, 2016). A healthy civil society – including the upholding of democratic processes, citizen participation and social inclusion – is predicated on achieving a balance between the state, community and market sectors. It is argued that this is at stake in the current climate where market power is continuing to rise (Meagher & Goodwin, 2015; Smyth, 2015; Somers, 2008).

As a consequence of this neoliberal policy shift, some argue that 'the non-profit sector as a whole is in crisis' (Meekosha, Wannan, & Shuttleworth, 2016, p. 185). The dominance of neoliberalism has seen financial, rather than social, outcomes prioritised, public spending reduced, the state's role decreased and its responsibilities increasingly transferred to the private sector (Khoury, 2015). The effects of this shift have been felt at various levels, including the shape and structure of the system; the scope of organisational activities; the nature of service provision (Roussy & Livingstone, 2018);

community engagement (Meade, Shaw, & Banks, 2016); and the impact on staff (Marston & McDonald, 2012).

The influence of neoliberalism on the shape and structure of the system is also evident in the dominance of a small number of very large organisations in the sector, often flourishing at the expense of smaller organisations (Dalton & Butcher, 2014), and in the penetration of large, multinational, for-profit providers (Gallet, 2016). The scope of activities offered by community service organisations has also been increasingly restricted to service provision, eschewing advocacy, with those that persist in their advocacy role bearing the cost, including losing funding (Meekosha, Wannan, & Shuttleworth, 2016). Many large community service organisations that were once outspoken advocates in the pursuit of social justice have abandoned this role to safeguard their business interests (Berman, Brooks, & Murphy, 2006; Dalton & Butcher, 2014).

One of the most significant impacts of neoliberalism on the community sector is its influence on the nature of service provision. Caplan and Ricciardelli (2016) contend that the pursuit of a neoliberal agenda in community services results in punitive, limited policies and interventions that are at odds with the purpose of a contemporary welfare system. Within the dominant neoliberal framework where economic participation is prized, for example, the person's social worth is linked to their participation in the economy. Personal responsibility is emphasised and structural and systemic issues are downplayed (Caplan & Ricciardelli, 2016). Within the context of the neoliberal agenda, the market is seen to solve economic and social problems; however, the reality is that social services often exist to address market failure. Caplan and Ricciardelli (2016) argue that while a prevailing, and often unquestioned, belief is that the market will ensure that efficiency and effectiveness in service delivery are maximised, these goals in themselves do not ensure good practice or proper treatment of people (Caplan & Ricciardelli, 2016).

Meade, Shaw, & Banks (2016) argue that the impact on practice extends beyond service delivery to influence how community service organisations relate to communities with which they engage. The growing preoccupation with a managerialist agenda of 'efficiency, performance and compliance with centrally determined indicators of competency and achievement' (Meade, Shaw, & Banks, 2016, p. 11) means that local communities are limited in their capacity to influence what is prioritised (Meekosha, Wannan, & Shuttleworth, 2016). The responsibility for overseeing outcomes, which have been agreed with funders, moves from communities to 'experts' who use business and other metrics to monitor progress against targets, diminishing the role that the community plays in exercising its democratic role of oversight.

Staff are directly affected by neoliberal practices such as competitive tendering and privatisation, which, it is argued, result in reduced quality of working conditions (Meekosha, Wannan, & Shuttleworth, 2016). Staff have been socialised into accepting the underlying values and principles of neoliberalism or have responded to the pressure to survive in a competitive operating environment. This has seen them co-opted to practise in accord with this paradigm (Caplan & Ricciardelli, 2016). Ferguson (2004, p. 24) states that 'social work has not taken any serious attempts to resist this movement'; rather, it is adapting to reflect the dominant neoliberal paradigm, increasingly using this framework and associated market mechanisms to understand and address human and social problems. Swain (2017) states that 'while social work was a profession committed to social change, too many of its practices were focused on social maintenance, placing practitioners in a situation where they were complicit in perpetuating the very inequalities they were committed to overcoming' (pp. 21–22). Marston and McDonald (2012) contend that the dissonance between the goals of social work and the realities of current practice is impacting negatively on social workers, resulting in 'ambivalence, uncertainty and doubt' (p. 1034), further reducing their agency to respond to social problems.

In the face of this, many social workers and others with a commitment to social justice continue to struggle to find innovative ways of working that reflect this orientation. Some scholars argue that the commitment to values continues to distinguish the community sector (Cheverton, 2007). One example of this resistance is their advocacy role; another is eschewing the use of language, such as *consumer* and *customer*, which reflects a view that people are buying products rather than having access to services and participating in the community as citizens (Onyx, Cham, & Dalton, 2016).

In my view, the sector has largely failed to examine, resist or critique the underlying principles of the current ideology and how they manifest in the operations of the community sector, specifically the impact on the most vulnerable and disadvantaged. As a consequence, the sector is arguably assisting in the demise of its values-based identity and privileging policies and practices that are at odds with it, succumbing to 'mission-drift' (Caplan & Ricciardelli, 2016; Dalton & Butcher, 2014). It is in this context that my thesis is able to make a contribution. My personal experience, which will be spelled out in Chapter 5, demonstrates that drawing on the Jesuit identity of the organisation helped me to navigate the various challenges associated with the dominance of neoliberalism. I see the value, therefore, in articulating a model for fostering this

values-based organisational identity, which might be adapted to assist other organisations to operate in line with their purpose. I now turn to the Jesuit heritage which forms part of the context in which I work.

The Context of the Society of Jesus

As indicated in the introduction to this chapter, some features in the contemporary context of the Jesuits lent some urgency to my intention to undertake this research, influenced the model I developed, and present possible impediments to its implementation.

An orientation toward social justice has been a critical component of the Society of Jesus from the outset and its history is studded with both heroic and unseen fidelity to this mission. Despite the foundational orientation and articulated intent to promote justice, I suggest that there is potential for the Jesuits, and those who walk in this tradition, to make an even greater contribution to building a more just world. Though Jesuits have been both lauded and criticised since their establishment (Harriott, 1975; Pavone, 2016), it is widely acknowledged that they have made a significant contribution across many fields, including education, the arts, science and spirituality (O'Malley et al., 1999; Worcester, 2008). From the outset, a characteristic of the Society of Jesus has been mobility, which Banchoff and Casanova (2016) describe as being 'culturally encoded' (p. 7) in the Society. This is encapsulated by Nadal's declaration that 'the world is our home' (cited in Banchoff & Casanova, 2016, p. 7). The Society's influence and reach exists still today. Banchoff and Casanova (2016) contend that although the Jesuit network is 'smaller, less centralized, and less connected to political and economic elites than it was during the pre-suppression centuries' (p. 21), it continues to be influential in many places throughout the world. For example, the Jesuits provide education at a large scale; the global Jesuit School Network currently has 3,730 schools and teaches 2.5 million students (Jesuits, n.d., 'Education', para. 3). Politically, they have been involved in successful activist campaigns, such as the banning of metals mining in El Salvador (Lakhani, 2017; Palumbo, 2017). Their influence within the field of social work includes the contribution of Felix Biestek, a Jesuit, who developed the case work methodology expounded in *The Casework Relationship* (1957). This text is considered 'seminal' in the field of social work (Cheung, 2015, p. 92). According to White (2015), Biestek was 'instrumental in bringing to the attention of the social work profession the centrality of the use of self as the key to effective practice' (p. 82), a position that continues to be confirmed by researchers and practice leaders in the field since his work was published

(Hennessey, 2011; Kadushin & Kadushin, 2013). Given the Jesuits' demonstrated capacity to be influential across a number of domains, combined with their extensive reach from the grass roots to centres of power across dozens of countries, I argue that they have ongoing potential to live out their mission of promoting justice, with far reaching effects. Further, there is currently an authorising environment to pursue this direction under the leadership of Pope Francis, a Jesuit with a demonstrated commitment to those in need and the pursuit of justice.

Consistent with changes more broadly in the Catholic Church, however, the Jesuits have seen their overall numbers decrease worldwide from approximately 30,000 members in the 1970s to approximately 16,000 in 2019 (Jesuits, n.d., 'The Jesuits', para. 3) and there has been a simultaneous growth in the number of laypeople working in Jesuit ministries (Kolvenbach, 2004). This situation creates a key challenge for the Society in preserving the Jesuit identity of works undertaken in their name and *forming* people to work in a way that is consistent with this identity (Guibert, 2018).

I argue that a method for fostering Jesuit identity in our contemporary reality in which lay people, and organisations, are instrumental in achieving the mission of the Jesuits has not yet been sufficiently developed. In this section, I expand on this heritage of promoting justice and detail the contemporary challenges and opportunities the Society of Jesus faces in order to provide further context for my research.

The Life and Spirituality of Ignatius of Loyola

In order to identify elements from Jesuit heritage that speak to the identity of a Jesuit community service organisation, it is necessary to look at the founding charism of the Jesuits. In the Catholic Church, religious orders are understood to have specific charisms that usually relate to their founders and are given expression in an ongoing way within the communities, works and organisations of the order (Le, 2016). Charisms are understood to be a spiritual gift, grace or talent that is given to someone for the benefit of others. The charism of the Jesuits is understood to originate from the experiences of the founder, Ignatius of Loyola, and his first companions, and given expression 'historically and institutionally' (Garcia de Castro, 2009, p. 312). The Jesuit charism

> refers to the Jesuits' characteristic 'way of proceeding', to their particular way of being disciples of Christ. Expressions such as 'finding God in all things', being a 'contemplative in action', doing all 'for the greater glory of God' seek to capture the heart of the Jesuit charism. (Corkery, 2017a, p. 154)

The story of Ignatius's life is captured in the *Reminiscences: or Autobiography of Ignatius Loyola* (Da Câmara, n.d./1996), transcribed by one of the early companions of the Society of Jesus. This text is foundational in the Jesuit tradition. It explores his experience of conversion, spiritual journey and the foundations of his commitment to work with the poor and the marginalised. I argue that this commitment, often expressed today as the promotion of justice, is a central theme in the life of Ignatius of Loyola and therefore a critical dimension of the Ignatian charism.

Ignatius of Loyola, Inigo for his first thirty-six years, was born in Basque Country in Spain in 1491, into a family with a long lineage and a tradition of service to the Crown of Castille (Caraman, 1990). Ignatius was involved in a battle in Pamplona against the French and was badly wounded by a cannon ball that shattered his right leg and damaged his left leg (Da Câmara, n.d./1996). He convalesced at Loyola for about nine months, during which time he had an experience of conversion (Da Câmara, n.d./1996). Over the next period of Ignatius's life, he underwent a spiritual struggle. He undertook a pilgrimage to Jerusalem in 1523 and eventually came to study in Paris, where he met the companions with whom he would found the Society of Jesus. He lived a simple lifestyle, staying in hospices, where he tended to the sick, and sought to address injustices he encountered (Da Câmara, n.d./1996). *Reminiscences* (Da Câmara, n.d./1996) emphasises his lifelong direct service to, and spiritual engagement with, the poor and marginalised. Ignatius was elected Superior of the Society of Jesus after its official papal approval in 1540. He wrote the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c) and continued his work of leading the new order over the following years. Alongside this work, he continued his service to the poor. He died on 31 July 1556.

The story of the life of Ignatius of Loyola is seminal to Jesuit heritage and demonstrates that working with the marginalised and impoverished was at the heart of the Society's mission from its very foundation. From the establishment of the Society, Ignatius saw direct engagement and service of the poor as a central purpose of the order. This can be seen as the precursor to what in today's terms the Jesuits call *faith doing justice*. The history of the Society is often referred to as comprising three distinct periods: the First Society (1540–1773); the Restored Society (1814–1965) following the suppression; and the Renewed Society (1965–2020). I will examine these phases and point to evidence of this foundational purpose of *faith doing justice* throughout the history of the Society.

The First Society

From its establishment, the Society of Jesus prioritised service to the poor and the care of others. This is evident in its founding documents, the 'Formula of the Institute of the Society of Jesus' (Ignatius of Loyola, 1540/1996d, 1550/1996e) and the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c), as well as in their early endeavours and efforts to address structural injustice. The Society of Jesus was officially founded in 1540 when Pope Paul III approved the papal bull Regimini Militantis Ecclesiae (To the government of the church militant). A revised 'Formula' (Ignatius of Loyola, 1550/1996e) was approved by Pope Julius III in 1550 through the bull Exposcit Debitum (The duty requires).

The 'Formula of the Institute' (Ignatius of Loyola, 1540/1996d, 1550/1996e) establishes what was to become known as *helping souls* as central to the Jesuits' purpose and impact. This can be understood as care for the whole person, in body, mind and spirit (O'Malley, 1993). The ministries by which this can be achieved are listed in the 'Formula', first in 1540 as 'works of charity' (Ignatius of Loyola, 1540/1996d, p. 4, n. 1), and extended in 1550 to state that each member of the Society of Jesus 'should show himself ready to reconcile the estranged, compassionately assist those who are in prisons or hospitals, and indeed to perform any other works of charity' (Ignatius of Loyola, 1550/1996e, p. 4, n. 1). Until this time, while religious orders had engaged in 'works of charity' (Ignatius of Loyola, 1540/1996d, p. 4, n. 1), this aspect of their activity was not named as a core characteristic of their purpose (O'Malley, 1993). By including a commitment to the poor and to the undertaking of 'works of charity' (Ignatius of Loyola, 1540/1996d, p. 4, n. 1), the 'Formula' underlines the importance of direct engagement with poor people and those on the margins. The Jesuits went a further step; alongside direct service to those in need, Ignatius and his followers also sought to influence unjust structures (Alvarez de los Mozos, 2019).

'The Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c) consolidate the mission and purpose of the Society, provide guidelines that govern Jesuit life and 'give a fuller and more particularised treatment of various matters' (Society of Jesus, 1559/1996, p. xviii) that are outlined in the 'Formula' (Ignatius of Loyola, 1540/1996d, 1550/1996e). The 'Constitutions' also state that Jesuits should 'travel to any place where they judge that the greater service of God and the good of souls will follow', intervening where there is 'greater need', where there might be 'greater fruit' or 'greater universal good' (Ignatius of Loyola, n.d./1996c, p. 276, n. 1; pp. 284–286, n. 1D).

From its foundational documents, it is clear that the Society was committed to engagement with the poor and the promotion of justice from its origins. It was also committed to a particular *way of proceeding*. Jerome Nadal, a contemporary of Ignatius, wrote that 'the form of the Society is in the life of Ignatius … God set him up as a living example of our way of proceeding' (cited in Society of Jesus, 1995/2009d, p. 659, d. 26, n. 1). As such, the *way of proceeding* refers to the Jesuits' 'style of life and ministry' (O'Malley, 1993, p. 8), which, rooted in Ignatian spirituality, speaks to an approach rather than the adoption of specific activities (Garcia de Castro Valdes, 2016). A central purpose of this approach is to identify the greater good that should be enacted in any situation: not just settling for the *good*, but striving for the *more.* This dynamic is captured by the term *magis*, which guides the Jesuits' work and activity (O'Leary, 2017c).

O'Malley (1993) identifies three features that characterised the approach of the early Jesuits: a focus on 'bodily healing' (p. 166); a desire to contribute to 'the common good' (p. 167); and an orientation towards institutions, whether these were existing (such as hospitals), or establishing new initiatives to respond to need. For example, in 1540, Ignatius led the development of an orphanage in Rome, followed shortly after by the creation of a refuge for prostitutes, Casa Santa Marta. The Jesuits worked alongside confraternities of laypeople to ensure that service responses were tailored to local situations and to foster continuity of work (Murphy, 2008; O'Malley, 2013). In 1548 the Jesuits opened their first school in Messina, Sicily (Grendler, 2018). Their schools were cultural institutions that played an important civic role; this led to strong engagement with secular society that 'was not occasional or incidental, but systemic' (O'Malley, 1993, p. 242). Their schools were predominantly for the poor and education was offered free of charge (O'Malley, 1993). Alongside this, the Jesuits continued to express their commitment to 'works of charity' (Ignatius of Loyola, 1540/1996d, p. 4, n. 1) over the centuries (Alvarez de los Mozos, 2019). This work included tending to the sick, such as during outbreaks of the plague (Worcester, 2017). According to Alvarez de los Mozos (2019), 'in the first 100 years after the death of Ignatius, 1,190 Jesuits died by contracting diseases from patients in their care' (p. 37). In the seventeenth and early eighteenth centuries the Jesuits were also involved with people on the margins of society in activities that stood outside 'the traditional corporal works of mercy' (Campbell-Johnston, 1997, p. 8). They lived and worked in numerous countries beyond Europe, and their approach involved 'dialogue, patient mastery of languages, and cultural and scientific exchanges' (Banchoff & Casanova, 2016, p. 8).

The Restored Society

The Society of Jesus was suppressed by Pope Clement XIV in 1773, which not only meant expulsion from all European countries other than Russia, and seizure of the order's assets, but the formal closure of the order (Banchoff & Casanova, 2016; Hollis, 1968; Schlafly, 2015; Wright & Burson, 2015). The reasons for the suppression are many and complex (Wright & Burson, 2015), though some scholars note that throughout history the Jesuits' 'influence, initiative, and open and pragmatic way of proceeding … [had] provoked much resistance and controversy' (Banchoff & Casanova, 2016, p. 1).

In 1814 the order was restored by Pope Pius VII (Worcester, 2008). It has been argued that in the period following the restoration, the Jesuits appeared to align themselves more to the status quo and be less willing to embrace intercultural dialogue, which had been an earlier expression of their way of proceeding (Banchoff & Casanova, 2016; Worcester, 2008). Padberg (1994) contends that 'much of the contemporaneity, imagination, and daring of the early years of the Society had inevitably been lost in the wrack and ruin of the Suppression in 1773' (p. 102), and that these were not reinvigorated at the time of the restoration in 1814. However, from the beginning of the twentieth century, in line with the growing body of Catholic Social Teaching, successive leaders of the Jesuits helped redirect the order's orientation in keeping with the original ideals expressed in the foundational documents (Banchoff & Casanova, 2016).

In the late nineteenth and twentieth centuries, the view that the state should play a key role in shielding its citizens from poverty was promoted widely in Church circles, and religious leaders advocated this position broadly within the public sphere (Alvarez de los Mozos, 2019). Within the Catholic Church, the promulgation of Pope Leo XIII's (1891/1931) encyclical *Rerum Novarum* heralded the genesis of the formal, influential body of Church teaching on social justice, Catholic Social Teaching, with its four foundational principles: human dignity, the common good, subsidiarity and solidarity (Pontifical Council for Justice and Peace, 2004). The relationship between *Rerum Novarum* (Leo XIII, 1891/1931) and Catholic Social Teaching and the General Congregations of the Society of Jesus is evident.[1]

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[1] Note that there will be two modes of referencing General Congregations. Where referring to the documents from General Congregations, the General Congregation name and number will be italicised. Where referring solely to the event, it will appear without italics.

General Congregations in This Period

In this section, I examine documents of the General Congregations of the Society to explore the evolution of their commitment to the promotion of justice. General Congregations are significant meetings of the Society. Their purpose is set out in the 'Constitutions' (Ignatius of Loyola, n.d./1996c). They do not occur on a regularly scheduled basis, but are convened only for weighty matters such as electing a new superior general or strengthening the focus of the Society in a particular area of concern (Ignatius of Loyola, n.d./1996c).

General Congregation 24 in 1892 saw the election of Fr Luis Martin SJ as superior general (1892–1906), who had an interest in social matters and 'urged the Society to give them its attention' (Padberg, O'Keefe, & McCarthy, 1994, p. 42). The documents of General Congregations 24 and 27 point to the burgeoning reorientation toward social matters. While their concern is for the 'workers' and 'the poor', (Society of Jesus, 1892/1994a, p. 486, d. 20; 1923/1994b, p. 572, d. 226, n. 1), their focus remains on their spiritual needs. It is in *General Congregation 28* (Society of Jesus, 1938/1994c), Decree 29 that the first reference is made to the Society's 'apostolic social works' (p. 606, d. 29, n. 2, para. 5). In this *General Congregation*, the focus is on the needs of workers, including encouragement to 'foster unions and social institutes' (Society of Jesus, 1938/1994c, p. 607, d. 29, n. 2). Marking a significant step up in commitment to these social works, Decree 29 concludes with the recommendation that 'centres of social action and a secretariat' (Society of Jesus, 1938/1994c, p. 607, n. 5) be established, and for other ministries to be 'given up, so that we may direct our efforts toward the more universal good' (Society of Jesus, 1938/1994c, p. 608, n. 5).

Directly after the Second World War, General Congregation 29 in 1946 devoted a decree to the social apostolate for the first time in the Society's history (Alvarez de los Mozos, 2019; Padberg et al., 1994). This was the first Congregation to dedicate extensive attention to this work, its features, and its organisation (Padberg, O'Keefe, & McCarthy, 1994). Fr Janssens SJ, superior general of the Society of Jesus (1946–1964), issued his *Instruction on the Social Apostolate* (1949), exhorting Jesuits to reorient their efforts towards the needs of the poor. This was the first time a superior general had spoken to the whole Society about its social commitment (Campbell-Johnson, 1997).

The plight of workers continued to be the locus of this commitment at this time. The number of social centres established across the world increased, particularly in Latin America and, according to Campbell-Johnston (1997), a number of young Jesuits were channelled into social sciences studies. In *General Congregation 30* (Society of Jesus,

1957/1994d), this work was commended and the Jesuits were exhorted again to focus on the ‘mission to workers’ (p. 674, d. 52, n. 1). The establishment of trade schools and night schools for young working-class people was encouraged (Society of Jesus, 1957/1994d, d. 52, n. 2).

The Renewed Society

The 1960s through to the 1980s was a time of social unrest that impacted on the Society of Jesus, and the Catholic Church more broadly. The Second Vatican Council (1962–1965) occurred in the midst of this broader social change (Ormerod, 2007), which, along with the rise of key social movements, characterised the 1960s and following decades. It heralded a time of significant change in the Church, including its call for an enhanced role for the laity (Vatican II, 1963/2012). This led to women and men taking up new roles or functions, a number of which had previously been the province of priests (O’Collins, 2014). New theological understandings emerged in the following decades, such as Liberation Theology in the 1970s in Latin America, strengthening the focus on addressing structural injustice (Gutierrez, 1973; Oliveros, 1993). Nevertheless, change in the Church was often slow and actively resisted in some quarters (Carroll, 2012).

In the era of the second Vatican Council and since, General Congregations of the Jesuits took up similar themes, including the role of the laity, relationships with women, and collaboration (Hinsdale, 2008). For example, *General Congregation 31* (Society of Jesus, 1967/2009a) acknowledged the relationship between the Jesuits and laypeople and noted the need to ‘open up to them in various ways a wide participation in as well as responsibility for the direction, administration, and even government of our works’ (p. 185, d. 33, n. 6). At General Congregation 31, Fr Pedro Arrupe SJ was elected superior general of the Society of Jesus (1965–1983). Fr Arrupe SJ has been referred to as the second founder of the Society (Menkhaus, 2017) and under his leadership the Jesuits refocused their mission (Campbell-Johnston, 1997). Divarkar (1997) characterises *General Congregation 31* in 1967 as a ‘return to the foundational charism and adaptation to current circumstances’ (p. 6). *General Congregation 31* was less concerned with ‘practical norms for particular ministries’ than ‘a comprehensive, global notion of mission’ (Bisson, 2014, p. 60).

In the years between General Congregation 31 and General Congregation 32 in 1975, Fr Arrupe SJ pressed for more commitment among the Jesuits to social justice and to the social apostolate (Campbell-Johnston, 1997). The Social Justice Secretariat (today called the Social Justice and Ecology Secretariat) was established in Rome in 1969,

providing a visible commitment to this direction. This refocusing of mission generated the establishment of numerous Jesuit initiatives across the world that aimed to promote justice. In addition to fostering work and studies in the field, its purpose was to ensure that 'through the Society and its members, the Church be actively present in the main international associations and congresses concerned with development' (Campbell-Johnston, 1997, p. 12). In an address to Jesuit leaders in 1970, Fr Arrupe SJ named the Society's four priorities. He signalled the importance of the social apostolate, saying it 'comes second in the order of precedence among ministries of the Society today' (Arrupe, 1970, p. 3), following 'theological reflection on the human problems of the day' (p. 1).

At General Congregation 32 (Society of Jesus, 1975/2009b), the Jesuits committed to 'the service of faith, of which the promotion of justice is an absolute requirement' (p. 298, d. 4, n. 2). Drawing on the example of Ignatius and the first companions, the Society was called to examine the current reality, renew its mission and adapt it 'to the new needs of the times and to a world in process of rapid change' (Society of Jesus 1975/2009b, p. 299, d. 4, n. 9). Decree 4, 'Our Mission Today' (Society of Jesus, 1975/2009b, pp. 298–316), drew attention to the interconnected and structural nature of injustice:

> There is a new challenge to our apostolic mission in a world increasingly interdependent but, for all that, divided by injustice: injustice not only personal but institutionalised: built into economic, social and political structures that dominate the life of nations and the international community. (p. 298, n. 4)

The 'most important conclusion' of General Congregation 32 'was that working for justice in society is an essential dimension of Jesuit efforts to advance people's faith in God and in the Gospel of Christ' (Hollenbach, 2016, p. 176). The Jesuits' stated commitment to *the faith that does justice* signalled the social implications of their faith and their intention to address structural injustice in their efforts to 'help souls'. This renewed commitment to the poor and social justice had its solid foundations in the life of Ignatius and in the founding documents of the Society. There is an 'unbroken thread of inspiration' (Kolvenbach, 1997, p. 3) from Ignatius's life to Decree 4, and Padberg (1994) considers General Congregation 32 the 'return full circle and in contemporary ways to the élan and imagination of the early Society and of the service it gave to the Church' (p. 103).

The establishment of the international organisation Jesuit Refugee Service in 1980 was a global response to this newly stated mission. Jesuit Refugee Service is a legacy of Fr Arrupe SJ, who was determined to intervene to address the emerging crisis of Vietnamese refugees. He saw the Jesuits as uniquely positioned to respond to this crisis and to coordinate international humanitarian responses, in part because of their large numbers and because of their geographic spread (Alvarez de los Mozos, 2019; Villanueva, 2008). Jesuit Social Services, an Australian organisation, also had its origins in this era, established in 1977 under the name Four Flats (I expand on this later in the chapter, where I look more specifically at the work of the Australian Jesuit Province).

At General Congregation 33, Fr Peter Hans Kolvenbach SJ was elected superior general of the Society (1983–2008). General Congregation 33 was significant in confirming the direction and consolidating the changes spelled out in General Congregation 32, given that the paradigm shift it heralded had inevitably led to tensions within the Society, with a vocal minority in some regions actively resisting the changes (Cosacchi, 2019).

General Congregation 34 (Society of Jesus, 1995/2009d) reaffirmed, developed and deepened earlier understanding about the commitment made at General Congregation 31 to 'the service of faith and the promotion of justice' (Society of Jesus, 1995/2009d, p. 527, d. 2, n. 14). It highlighted the importance of working effectively across cultures and faiths, and also identified 'new dimensions of justice' beyond the previous focus of working for 'structural changes in the socioeconomic and political orders' (Society of Jesus, 1995/2009d, p. 531, d. 3, n. 5). It extended the understanding of justice to include 'social, cultural and religious … dimensions' (Bisson, 2014, p. 61), as well as 'human rights, globalization, human life, environment and communities of solidarity' (Greene, 2012, p. 7). *General Congregation 34* (Society of Jesus, 1995/2009d) returns to the relationship between the Jesuits and the laity, and also deals specifically with relationships with women. Decree 13, 'Cooperation with the Laity in Mission', (pp. 608–615) calls on the Jesuits to 'shift the focus of our attention from the exercise of our own direct ministry to the strengthening of laity in their mission' (p. 613, n. 19). Decree 14, 'Jesuits and the Situation of Women in the Church and Civil Society' (Society of Jesus, 1995/2009d, pp. 615–619), which built on an earlier reference in *Congregation 33* (Society of Jesus, 1983/2009c) to the 'unjust treatment and exploitation of women' (p. 453, d. 1, n. 35), calls for the involvement of women in decision-making and promotes equality of women within Jesuit institutions.

At General Congregation 35 in 2008, Fr Adolfo Nicolás SJ was elected superior general (2008–2016). *General Congregation 35* (Society of Jesus, 2008/2009e, pp. 744–754, d. 3) named the importance of reconciliation with creation. This triptych of relationships – relationship with God (faith), with others (justice), and with creation (ecology) – is now seen as central to the Jesuits' purpose. General Congregation 35 also presented a 'renewed emphasis on intercultural dialogue' (Cosacchi, 2019, p. 667). Since General Congregation 35 in 2008, there has been a focus on encouraging advocacy networks to address global problems such as migration, justice in mining, and ecology (Alvarez de los Mozos, 2019).

General Congregation 36 in 2016 took place three years after the election of Pope Francis, the first Jesuit pope, and saw the election of Fr Arturo Sosa SJ as superior general (2016–present). *General Congregation 36* (Society of Jesus, 2016/2017) reinforced some fundamentals of Jesuit heritage. Decree 1, 'Companions in a Mission of Reconciliation and Justice' (pp. 14–21) highlights the fundamental importance of being in relationship with the poor; fostering the characteristics of being available, mobile, humble, free, able to accompany people, patient and being prepared to listen in order to speak truth (Society of Jesus, 2016/2017, d. 1, n. 11). The overall thrust of reconciliation – with God, neighbour, creation – was confirmed; and, in keeping with this commitment, came the call to pursue new economic and social paradigms that reflect this orientation. This Decree cites Pope Francis's words from his encyclical Laudato Si: 'We are faced not with two separate crises, one environmental and the other social, but rather with one complex crisis which is both social and environmental' (Society of Jesus, 2016/2017, p. 14, d. 1, n. 2). Reconciliation with creation reiterates the connection between social and environmental crises, linking these to 'the flawed ways societies and economies are organised' and calling for the promotion of 'a new way of producing and consuming' (Society of Jesus, 2016/2017, p. 14, d. 1, n. 29).

Having traced the history of the Society of Jesus's commitment to the promotion of justice, I now turn my attention to some contemporary contextual factors that impact on its capacity to live out this mission more completely.

Current Challenges

In the introduction to this chapter, I outlined the challenge faced by the Society of Jesus in fulfilling its mission. Central to this mission is the promotion of justice, but the Society has not consistently dedicated significant, organised and coordinated attention or resources to address broader social need, outside the institutional response of the Jesuit

Refugee Service. This has been recognised by those within the Society itself. In 2000, Fr Kolvenbach SJ noted in a letter to the Jesuits regarding the social apostolate that the Society had broadly accepted the social dimension of its mission that had been actively promoted since General Congregation 32 across its various ministries. He lamented, however, that this commitment had not manifested in Jesuits engaging directly in the work of this sector, with 'fewer Jesuits available and less prepared for the social apostolate' (Kolvenbach, 2000a, p. 23). Fr Kolvenbach SJ (2000a) urged the Jesuits to reinvigorate the social apostolate in each province (administrative region) or risk losing the Society's social dimension that is central to its mission.

In my view, this raises two interrelated issues that the Society must address and that are central to my study. The first is its apparent ambivalence in relation to establishing substantial, enduring institutional responses in the social apostolate. The second is the problem of how to ensure, in the face of dwindling membership, the Jesuit identity of its community service organisations and the work it undertakes.

In the past, personnel in Jesuit institutions were almost entirely Jesuit and it was assumed that this ensured the organisation's Jesuit identity. Given that laypeople are increasingly staffing and leading their organisations, the Jesuits can no longer rely on their own internal *formation* (induction, training and development) process to ensure a Jesuit approach to the work and the Jesuit identity of their organisations. Moreover, it is my experience that for outsiders, it has often been difficult to grasp or to become proficient in the language and practice of this approach, resulting in its remaining impenetrable for many. For instance, most documentation about Jesuit identity and heritage, including its contemporary expressions and application to particular sectors, has been written by Jesuits for Jesuits, often leaving the treasures of this tradition inaccessible for those unfamiliar with it. Therefore, it is important that other processes are developed and articulated, and that a Jesuit approach to particular fields of work is spelled out.

This has been most successfully undertaken in the field of education, for which the Society has developed a clear approach from its foundation to today (Mesa, 2017; Pavur, 2005). This is articulated in widely promulgated documents (International Commission on the Apostolate of Jesuit Education, 1986; 'Ignatian Pedagogy – A Practical Approach', 1993/2017; 'Ratio Studiorum', 1559/2017). The application of Jesuit heritage to the social sector has not occurred to the same degree. There have been efforts to identify characteristics of the social apostolate (Social Apostolate Secretariat, 1998), to outline features of a Jesuit social centre (Social Justice Secretariat, 2005), and

to identify the kind of activities undertaken within the social apostolate (Social Coordinators of the Conferences, 2015). However, while these documents make a valuable contribution, they are not easily understandable to those not steeped in this tradition; nor has the work been done to articulate how those preliminary documents could be operationalised in practice. Such efforts are hampered, no doubt, by the relative lack of investment, in terms of human and financial resources, in the social apostolate.

In relation to Jesuit organisations more broadly, Guibert (2018) asserts that their future rests on addressing the challenge 'to articulate Ignatian values and ways of proceeding within the institutions' (p. 42), and that this requires genuine collaboration between Jesuits and laypeople. Despite the pressing need for a model to foster Jesuit organisational identity, very little has been written about this, apart from more recent interest in the topic of Ignatian leadership (Broscombe, 2018; Cornish, 2018; Garant, 2018; Guibert, 2018; Lavin, 2018; Lecourt & Pauchant, 2011; Lowney, 2003; McCallum, 2018; McCallum & Horian, 2013; O'Connor & Myers, 2018; Rothausen, 2017; Tran & Carey, 2018).

Fostering the Jesuit identity of Jesuit Social Services has been a key focus of my work as CEO for many years. As such, the organisation is a central part of the context for this research. In the following section, I provide an overview of the organisation in the context of the Australian Society of Jesus. It is in my role as CEO that I have seen the challenges faced by the both the Society of Jesus and Australian community sector overlap and play out.

Jesuit Social Services and the Society of Jesus in Australia

I now provide a brief overview of the work of the Society of Jesus in Australia in relation to the social apostolate. This helps situate the work of Jesuit Social Services, and the Jesuits more broadly.

The first two Jesuits arrived in Port Adelaide in South Australia in 1848, and from the Austrian and Irish missions of the early colonial period the Australian Jesuit Province was established in 1950 (Strong, 1995). In commenting on the history of the Jesuits in Australia, Strong (1995) identifies the 1930–1970 period as one of 'great social and cultural change in the Society of Jesus in Australia' (p. 15). He notes that 'where once Jesuit ministry was directed at the elite and the influential men and women of society, an ethos of service to the poor began to emerge' (Strong, 1995, p. 404). In response to General Congregation 32 and the call to *faith doing justice*, in the 1970s the Jesuits experimented with new forms of mission (Alvarez de los Mozos, 2019).

Internationally, this was exemplified in the *worker priest* movement and *insertion communities* (Alvarez de los Mozos, 2019). I am aware of similar experiments in Australia.

This was the era when Four Flats, the predecessor to Jesuit Social Services, was founded. In 1977, a young Jesuit in training opened a halfway house for young people exiting custody. With the development of Four Flats, the social apostolate was given a sustainable, institutional expression in Australia, and the Jesuits made a foray into the formal community sector of Australian society.

At this time, in the community sector in Australia more broadly, there was a growing understanding that larger social, political and economic factors drive poverty and disadvantage; and in the 1970s, there was a shift to interventions that focused on community engagement and empowerment, beyond residual welfare models of care. I was connected with some of the Jesuits' grass roots, community-based experiments initiated at this time and recognise their alignment with the broader changes that were taking place in the community sector and beyond.

Over the following decades a handful of Jesuits in Australia engaged actively with social justice concerns, from accompaniment of people on the margins through to public advocacy. Beyond the activity of these individual Jesuits, there were some attempts to establish institutional responses within the social apostolate, such as the Asian Bureau Australia and Uniya Jesuit Social Justice Centre (Australian Jesuits, 2019). The Jesuit Refugee Service established a base in Australia in 1980 (Jesuit Refugee Service Australia, n.d., 'History'). Only Jesuit Social Services and Jesuit Refugee Service have endured.

In 1995, under its new name of Jesuit Social Services, the organisation expanded its scope of work in order to address some of the broader issues it determined were impacting on the life opportunities of young people in the criminal justice system. While maintaining a focus on service delivery and advocacy, from this point the organisation worked with a wider range of people in need and diversified its service response (Dunin, 2009). At the time of Jesuit Social Services' thirtieth anniversary in 2007, a decision was made to extend its geographical reach also, with operations extending beyond Victoria to New South Wales and the Northern Territory.

From Jesuit Social Services' establishment, its approach has been characterised by being in close relationship with people on the margins, listening and learning from them, and then committing to action to address the issues that emerge (Dunin, 2009).

Conclusion

In this chapter, I examined the operating context for my study and identified significant challenges for the community sector and for the Jesuits. I discussed the encroachment of neoliberalism that is impacting on the community sector and pointed to the importance of community service organisations having a values-based identity to help them withstand this trend.

I traced the history within the Society of Jesus of 'faith doing justice' (Society of Jesus, 1975/2009b, d. 4) and, while not new knowledge to me, the process highlighted its centrality to the Jesuits' very identity. This points to the importance of their finding ways to continue and extend their efforts to give expression to this purpose. I contend that the Jesuits lack a coherent model to operationalise this commitment in a contemporary context. In keeping with their own history of being willing to establish institutions to address need, I propose that they invest in sustainable organisational responses to assist them achieve this aim. As the Society has increasingly come to rely on laypeople to staff and lead organisations bearing its name, there is demonstrable value in articulating a model for fostering the Jesuit identity of a community service organisation in a contemporary context.

In the next chapter I explore the knowledge context for my research. The organisational identity field provides the theoretical underpinning that informs the model I present in Chapter 7 in order to achieve my research aim.

CHAPTER 4

Literature Review: Knowledge Context

In this chapter I detail the knowledge context for my research and explore the relevant scholarship on organisational identity. I first describe the process I undertook to identify organisational identity as the theoretical underpinning most relevant for my research. This includes the rationale and process for choosing organisational identity over other fields and the process used to locate relevant literature. I then introduce the field of organisational identity and outline major schools of thought within it to provide an overview of the key areas of contention, knowledge gaps and emerging understandings identified by scholars in this field that are relevant to my research. I identify conceptual frameworks that provide a theoretical underpinning to my own practical, experiential understanding of the topic and indicate where my research contributes to the organisational identity field.

Arriving at the Field of Organisational Identity

As an experienced social worker, I have seen that good practice endures and flourishes when it is supported within an organisation whose members can answer the questions: Who are we? Why do we exist? (Albert & Whetten, 1985/2004). This translates to a clear values-based identity and purpose that are expressed in a coherent way in an organisation's practice and across all domains of its operation. I searched for literature that would deepen my existing, experience-based understanding about organisational identity and how to foster it. I was seeking conceptual frameworks and possible theories that would explain or elucidate what I had learned through practice; contribute to my growing understanding about organisational identity and formation; challenge my assumptions; and enhance my evolving model for fostering Jesuit identity of a community service organisation.

The purpose of my literature review was to ground my research in the existing knowledge and identify material to help me explore the topic more deeply. In undertaking a critical review of the literature, I identify current debates and emerging understandings in relation to organisational identity. By synthesising these with my own experience, I aim to make a contribution to the constantly evolving field of organisational identity. Insights and findings emerging from this process feed into the model I propose.

Search Process

The search strategy used to locate relevant literature used in this review is summarised in Table 2.

Table 2: Locating relevant literature

Phase	Search terms	Activities
One	• Organi*ational identity • Organi*ational identification • Organi*ational image • Organi*ational culture	Part one: • Read broadly in the field of organisational studies • Excluded other sub-fields of organisational studies • Selected organisational identity as my field of inquiry
		Part two: • Identified key scholars and works • Mapped out the chronology of organisational identity discourse • Identified further works cited within key texts and edited volumes • Mapped out the main debates within this scholarship • Refined terms and questions, given that the primary focus within organisational identity was corporate entities
Two	• Organi*ational identity and community service • Organi*ational identity and non-profit/non-profit • Organi*ational identity and social services	• Identified scholarship specifically focusing on organisational identity that connects with the context of my thesis directly, such as social work, the community sector and non-profit organisations • Mapped out the main debates within this scholarship
Three	• Jesuits/Jesuit and organi*ational identity • Society of Jesus and organi*ational identity • Ignatian spirituality and organi*ational identity • Ignatius and organi*ational identity • Ignatian identity and organi*ational identity	• Refined search terms to identify literature relating to organisations connected with the Society of Jesus, Jesuit heritage, Ignatian spirituality • Discovered the main focus to be Ignatian leadership, and that discussion of organisational identity within this field is largely about educational institutions/organisations

The strategy involved three phases: Phase One entailed reading broadly in the field of organisational studies, which resulted in exclusion of other sub-fields of organisational studies before selecting organisational identity as my field of inquiry. Phase Two entailed refining my search terms resulting in identification of scholarship specifically focused on non-profit organisations. Phase Three involved refining my search further to focus on

Jesuit organisations, which allowed me to identify a gap in the literature, as there was a paucity of research into organisational identity as it relates to community sector organisations with Jesuit heritage.

In order to identify relevant materials across all Phases, I utilised online databases, including the following:

- SocIndex
- Business Source Complete
- Scopus
- SAGE journals
- ProQuest Central
- JSTOR
- Proquest Dissertations and Theses
- SpringerLink books
- EBSCOhost Business Source Complete
- Social Science Premium Collection

I searched the La Trobe University Library physical collection, as well as the Dalton McCaughey Library (an initiative of the Australian Jesuits, the Uniting Church in Victoria and Tasmania, and the Trinity College Theological School). In the final phase of my research, I identified materials in the Jesuit periodical *Promotio Iustitiae* for literature connected to the field of organisational identity and other search terms listed in Table 2.

Phase One entailed identification of key literature in the general field of organisational identity. This search reinforced my initial assumptions about the importance of organisational identity – of knowing why we exist as an organisation. In this Phase, I identified major works, most notably Albert and Whetten's article, 'Organisational Identity', first published in 1985. This is widely recognised as a foundational text in the field. As such, I established my timeline for the literature review to be between 1985 and 2020; however, I undertook separate focused searches for the years 2009–2020 in order to ensure that I identified contemporary sources.

A number of edited compilations were identified within Phase One that included contributions by prominent authors in the field including *Organizational Identity: A Reader* (Hatch & Schultz, 2004d) and the newly revised *Oxford Handbook of Organizational Identity* (Pratt, Schultz, Ashforth, & Ravasi, 2016a). These edited books

assisted in identifying key authors and debates in the field, and in mapping the chronology of organisational identity discourse.

I then scanned the bibliographies of sources identified through both online databases and chapters in these edited books to gather additional literature relevant to my areas of interest. Particularly useful in these searches were literature reviews, summaries and overviews of the field (Gioia & Hamilton, 2016; Gioia, Patvardhan, Hamilton, & Corley, 2013; He & Brown, 2013; Pratt, Schultz, Ashforth, & Ravasi, 2016b; Schultz et al., 2012; Van Knippenberg, 2016).

Literature identified in Phase One assisted me to refine my search criteria in line with my research aim. Specifically, I sought literature that addressed the questions: 'What is organisational identity' and 'How can it be fostered'? In doing so, I ruled out other related literature, such as that examining organisational identification, image and culture.

It became apparent that the vast majority of literature relating to organisational identity was focused on the corporate sector. For this reason, in Phase Two I conducted additional searches relating specifically to the social sciences and related field of social work. This refinement drew my attention to debates relevant to the community sector, including specific issues with which faith-based organisations contend.

Phase Three of the search strategy involved a more targeted search for resources relating to the field of organisational identity and the Society of Jesus. This search revealed that there is little written about Jesuit organisational identity. It unearthed literature that, in the main, related to Ignatian spirituality and leadership. While this has some relevance to my topic, its value for the purposes of this study is limited, given its focus on the individual rather than the organisation as a whole. Further, the literature on Ignatian spirituality and leadership is concerned largely with the education, not the community, sector. Phase Three therefore helped me identify a gap in the literature, as there was a scarcity of research on organisational identity as it relates to community service organisations in the Jesuit tradition.

Over half the literature I drew on was produced in the last ten years, and approximately a third was produced in the last five years (from 2014). Most literature originates from the United States and the United Kingdom. Approximately two thirds of the literature I drew on was 'conceptual', in the sense that it explores ideas, themes and concepts relating to organisational identity, rather than involving an empirical study. This includes secondary research in which other empirical studies are referenced or explored,

but where no new qualitative or quantitative research was undertaken. Approximately a third of the literature I drew on was primary research, including quantitative research, and qualitative research such as case studies and longitudinal studies (Boers & Ljungkvist, 2018; Clark et al., 2010; Fiol, 2002; Kreiner et al., 2015; Ravasi & Schultz, 2006).

Narrowing the Field

Before examining the organisational identity literature in depth, I now revisit associated concepts – organisational image, organisational identification and organisational culture – pointing to my rationale for rejecting them as my field of study. There is confusion about the meaning of these organisational concepts, which are used interchangeably at times (Alvesson & Robertson, 2016). However, most scholars agree that organisational identity is a distinct concept in its own right (Hatch & Schultz, 2004a), though with strong interrelationships with other constructs, such as organisational culture (Ravasi, 2016).

The concept of organisational identification, similar to organisational identity, is internally oriented. However, its concern is members' 'perception of oneness with or belongingness to a group' (Ashforth & Mael, 1989, p. 34). The construct has been defined as 'the congruence of individual and organizational values' (Riketta, 2005, p. 360). It occurs in reference to, or is dependent on, the existence of organisational identity (Ashforth & Mael, 1989), which is the 'antecedent' to identification (Aitken, 2019, p. 83). Organisational image, by contrast, is outwardly oriented. Some scholars focus on its relationship with organisational identity (Ravasi, 2016), and some contest the extent to which image impacts organisational identification (Alvesson & Robertson, 2016; Dutton, Dukerich, & Harquail, 1994).

The distinction between organisational identity and organisational culture has been the subject of much attention. Ravasi (2016) claims that studies over recent decades have successfully made the distinction between the two concepts, with culture being understood as a referent for identity claims. In line with this thinking, Glynn and Watkiss (2012) suggest that symbols, stories and rituals express the culture and serve as resources for organisational identity. This supports the idea that culture is a subset of organisational identity – with identity operating at a deeper level, giving rise to culture. Having examined and rejected the concepts of organisational image, identification and culture, I chose organisational identity as my field of inquiry.

Organisational Identity as My Field of Study

In their seminal article 'Organisational Identity', Albert and Whetten (1985/2004) point to identity questions such as 'Who are we? What kind of business are we in?' or 'What do we want to be?' (p. 90). These questions form the basis of those posed in this thesis: What is Jesuit identity? What is a model for operationalising it in a particular setting and context?

Conceptualisations of identity and the self are foundational aspects of organisational identity (Brown 2007; Gioia, Price, Hamilton, & Thomas 2010). It is argued that identity allows individuals to see themselves as distinct from others and, simultaneously, as similar to a particular group to which one belongs (Erickson, cited in Brown, 2007). Gioia (2008) points to the value we place on the matter of identity, both personally and organisationally:

> [Identity] constitutes the most meaningful, most intriguing, most relevant concept we deal with in both our personal and organizational lives. Identity is about us – as individuals and as organisation members – and it enquires into the deepest level of our sensemaking and understanding. (pp. 63–64)

Hatch and Schultz (2004c) and Pratt, Schultz, Ashforth and Ravasi (2016b) identify the roots of the concept of personal identity in psychology, social psychology and sociology. According to Hatch and Schultz (2004c), a number of identity theorists, including Cooley (1902), Mead (1934) and Goffman (1959), highlighted the social dimension of identity formation, which paved the way for researchers interested in understanding organisations and their identities to adapt the concept of identity to those settings (as cited in Hatch & Schultz, 2004c, p. 9). Organisational identity as a field emerged, then, as scholars applied the social science concept of identity, as it relates to individuals, to organisations.

It is widely acknowledged that Albert and Whetten's (1985/2004) landmark article 'Organizational Identity' marks the birth of organisational identity as a field of study (Hatch & Schultz, 2004b; He & Brown, 2013; Pratt et al., 2016b). Pratt et al. (2016b) mark Albert and Whetten's work as the beginning of the 'conceptualization' of organisational identity 'as a concept in its own right', giving rise to a 'proliferation of scholarly treatments' on the subject (p. 2). Pratt, Schultz, Ashforth and Ravasi (2016b) suggest that the appeal of organisational identity as a field of inquiry is that it addresses

'an essential question of social existence which transcends sectors and disciplines: Who are we as a collective?' (p. 3). The authors note that this effort to define ourselves can be thought of in terms of articulating fundamental attributes or of demarcating boundaries, denoting the organisation's similarities with and differences from other organisations (Pratt, Schultz, Ashforth, & Ravasi, 2016b). They claim that, in addition to addressing the fundamental question of 'who are we as an organisation', the concept of organisational identity appeals because it is 'at its heart a relational construct connecting concepts, ideas and fields' (Pratt, Schultz, Ashforth, & Ravasi, 2016b, p. 3). Pratt et al. (2016b) also point to organisational identity being a 'nexus concept' linking things and also acting as a 'meeting place' (p. 4), and contend that organisational identity appeals to many because it is 'inherently useful' (p. 5). Indeed, as a practitioner, this practical focus is very attractive. As CEO of Jesuit Social Services, I have long understood that my job is to translate the nearly 500-year-old Jesuit heritage in such a way that it is contemporary, accessible and useful, and then embed it into the fabric of the organisation to be expressed in very practical ways – from the highly strategic to the most mundane.

Scholars suggest that the relatively recent interest in the concept of organisational identity has arisen because of the way the increasingly networked world has introduced new challenges for organisations in managing their preferred identities (Alvesson, 1990/2004; Hatch & Schultz, 2004b). Alvesson (1990/2004) argues that shifts in our social context have seen a 'development from "substance" to "image"' (p. 166) and proposes that the rapidly growing interest he observed in organisational image, culture and identity was

> a defensive operation in order to compensate for the increasing complexity and ambiguity in and surrounding organizational life, the lack of (self-evident) meaning and clear traditional cultural patterns, which used to assure organizations and leaders of a workforce with a suitable work ethic and a psychological disposition for subordination under management and, thus, social integration at the workplace. (p. 180)

The insight that the shifting social context enhances the desire for organisational identity is pertinent to my study. In Chapter 3, I outlined the challenges facing the community sector and the Jesuits in the contemporary context, and pointed to the potential value of this research. A model for fostering strong organisational identity offers a way forward

for both. Strengthening values-based identity can assist community service organisations to resist the encroachment of neoliberal policies and practices and to better live out their purpose. For the Jesuits, who are endeavouring to manage their preferred identity in the context of their diminishing numbers, the availability of a model that is steeped in their heritage – while being accessible to the increasing numbers of laypeople staffing and leading their organisations – provides them a way to better fulfil their mission into the future.

A number of scholars have noted that the topic of organisational identity formation has received minimal attention in its own right (Gioia, Patvardhan, Hamilton, & Corley, 2013; Gioia, Price, Hamilton, & Thomas, 2010). Gioia et al. (2010) suggest that studies examining organisational identity change may provide some contribution to an understanding of organisational identity formation. In my literature review, I therefore include literature on both organisational identity formation and change.

In sum, the literature examined to date indicates the growing interest in, and importance of, organisational identity in a contemporary operating context characterised by rapid change. Next, I examine how scholars understand the concept of organisational identity, beginning with Albert and Whetten's article, 'Organisational Identity', before moving on to discuss the scholarship on the epistemological and ontological dimensions of organisational identity.

Albert and Whetten's 'Organisational Identity' (1985)

Since the publication of Albert and Whetten's foundational article, the field of organisational identity has flourished among organisational theorists and researchers and has been applied in a range of contexts (Gioia, Price, Hamilton, & Thomas, 2010). Beyond its significance as a field of study, He and Brown (2013) reference various scholars who point to the growing importance of organisational identity as a key management concern in relation to various organisational activities, including strategic change, decision-making, communications and internal conflicts (Humphreys & Brown, 2002; Ravasi & Phillips, 2011; Riantoputra, 2010). Before outlining some of the major debates in the field, I introduce a number of the key ideas proposed by Albert and Whetten (1985/2004) that remain influential to this day.

Albert and Whetten (1985/2004) define organisational identity in the following way: 'For purposes of defining identity as a scientific concept, we treat the criteria of central character, distinctiveness, and temporal continuity as each necessary, and as a set

sufficient' (p. 90). However, they also note that ultimately, 'the formulation of a statement of identity is more a political-strategic act than an intentional construction of a scientific taxonomy' (p. 93). They argue that organisations usually only wrestle with the question of their identity when trying to solve some type of problem or making significant decisions, and that the issue of organisational identity comes to the fore at key points in the organisation's life which, in turn, points to who and what is valued. They propose that at these times, organisations seek to answer the question of what their identity is by searching in 'the organization's culture, philosophy, market position, or membership' (p. 90). For Albert and Whetten (1985/2004), the statement of the organisation's identity lies in those features identified as central, distinctive and enduring.

Central refers to 'features that are somehow seen as the essence of the organization' (p. 90). They suggest that rather than seek to determine a universal list of measurable elements that define central character, 'for a given organization, a given purpose, and from a given theoretical viewpoint, one must judge what is or is not central' (p. 91). *Distinctive* refers to 'features that distinguish the organization from others with which it may be compared' (p. 90), and 'similar to members of the same class' (p. 92). They recognise that some features might be present in both central and distinctive, however they claim that these two criteria are independent given not all features will meet both criteria. *Enduring*, or temporal continuity, refers to 'features that exhibit some degree of sameness or continuity over time' (p. 90). They propose that 'organizational identity is formed by a process of ordered inter-organisational comparisons and reflections on them over time' (p. 98).

Albert and Whetten (1985/2004) further argue that organisations may have single, dual or multiple identities. They comment that there is a tendency to think of organisations as belonging to one category or another (they give the examples of Church or state, profit or non-profit); however, the reality is that many organisations are hybrids (Albert & Whetten, 1985/2004). They put forward the idea that there are two forms of duality: holographic and ideographic. The former occurs when each unit or part of the organisation gives expression to both identities – for example, a religious education facility that blends its religious and education functions across all its activities. The latter occurs when different units demonstrate the properties of one identity only, which together reflect the overall identity of the organisation – for example, an organisation with a social purpose comprising a non-profit arm and a for-profit business stream. These

different internal structures create different types of organisations and different sets of opportunities and challenges to contend with. Organisations with an ideographic form of dual identity often comprise specialist staff whose chief interests relate to their professional role compared with the organisation's overall purpose and values. Although a greater variety of staff may enhance the organisation's adaptive capacity in the face of challenges, the holographic organisation is likely to be better positioned to achieve staff alignment with a particular direction (Albert & Whetten, 1985/2004).

Pratt and Foreman (2000) argue that organisations' multiple identities can be managed successfully to enhance benefits and minimise disadvantages. The strategies they identify to achieve this are 'compartmentalization' (p. 26), 'deletion' (p. 29), 'integration' (p. 30), and 'aggregation' (p. 32), each with associated advantages and disadvantages.

The matter of hybrid identities is of interest to me given that Jesuit Social Services, like many community service organisations, sits within a religious tradition while rightly adhering to society's regulations, standards and expectations, and employing staff from diverse backgrounds and training disciplines. The question arises whether it is optimal, or even possible in the current highly secular operating environment, for such organisations to have a single identity; and if they have a dual identity (for example, a religious and community service organisation), is it better to be holographic or ideographic in form? This issue is pertinent given the concerns, among religious organisations, that their fundamental identity may be compromised when most personnel do not adhere to their founding religious principles. Many organisations are struggling with this particular aspect of organisational identity (Yip et al., 2010). In choosing how to proceed in the face of this challenge, any approach should be alert to Albert and Whetten's (1985/2004) suggestion that the greater the difference between how members understand themselves (identity) and how outsiders perceive the organisation (image), the greater the risk to the organisation's health.

Epistemological Questions: Social Actor or Social Construction?

Since 1985, scholars have debated ontological, epistemological and methodological questions of organisational identity (Gioia & Patvardhan, 2012; He & Brown, 2013). Gioia and Hamilton (2016) point out that since that time, the overwhelming focus of interest has been on epistemological questions; that is, scholars have focused on how, in order to best understand the phenomenon of organisational identity, it should be

conceived. Epistemological considerations have predominated in the literature, especially until the early 2000s. In looking at how best to conceive organisational identity in order to understand this concept, a number of schools of thought have emerged. The two major perspectives are *social actor* and *social construction* (Pratt, Schultz, Ashforth, & Ravasi, 2016b). Whetten and Mackey (2002) state that central to the distinction between *social construction* and *social actor* is the understanding of 'identity-as-shared perceptions among members versus identity-as-institutionalized claims available to members' (p. 395). The former views organisations as collectives of individuals; the latter views organisations as social actors that relate and operate as a collective.

In reviewing the literature in relation to these perspectives, there are features of each that appear relevant to my understanding of organisational identity. I draw on the literature related to each perspective in articulating the model that is the focus of my research.

Gioia and Hamilton (2016) explain that, in the social actor perspective, organisational identity is understood and communicated through the various claims that the organisation or its representatives make about the organisation. Within this perspective, organisational identity 'is a property of the organization itself as an entity, or social actor' (Gioia, Price, Hamilton, & Thomas, 2010, p. 5). Both social actor and social construction perspectives see organisational identity as self-referential (claims the organisation makes about itself). However, in the social actor perspective, the *sense-giving* (compared with *sense-making*) function of organisational identity is stressed (Ravasi & Schultz, 2006), with organisational identity being understood 'as a set of overt claims that conveys consistent expectations to both internal and external stakeholders regarding how the organization should be seen and how it should conduct itself' (Gioia & Hamilton, 2016, p. 24). Similarly, taking the social actor perspective, King, Felin and Whetten (2009) suggest that central to the organisation's self-view are its identity and its goals:

> Identity makes possible coherent, predictable social interaction within and among organizations. More specifically, identity creates a set of expectations about appropriate behaviour for a particular organization … without always relying on the sound personal judgment of each and every member or on specific routines or rules that specify behaviour. (pp. 295–296)

In the social construction perspective, it is the organisation's members who construct the organisation's identity: members seek to give meaning to their experiences and participate in a wide range of interactions within and across the organisation to formulate and negotiate agreement about what they view as the organisation's central, distinctive and enduring characteristics (He & Brown, 2013). It is from the shared understandings that members negotiate to describe themselves, the organisation, and its attributes, that the organisation's identity is derived (Ravasi & Schultz, 2006).

Members undertake sense-making, reflectively shaping the organisation's identity to articulate to those inside and outside the organisation who they are as an organisation (Gioia & Hamilton, 2016). In the social construction perspective, where members are understood to be continually negotiating and renegotiating meaning with internal and external stakeholders, Albert and Whetten's (1985/2004) concept of *enduring* is better understood as 'continuous' (Gioia & Hamilton, 2016, p. 25). Gioia, Schultz and Corley (2000) state that 'identity is imputed from expressed values, but the interpretation of those values is not necessarily fixed or stable' (p. 65). In viewing organisational identity as socially constructed they point also to the role of external influences in shaping identity and the need to understand organisational identity as dynamic. These external influences can include volunteers and donors (Johnson & Jian, 2017).

A process approach to organisational identity sees it as evolving constantly. In viewing identity construction as an ongoing process, Coupland and Brown (2004) point to the involvement of external and internal forces, plus interactions between the two. Members can be understood to go through various stages in the process towards embracing organisational change including interactions between their personal and organisational identities, with strong organisational identification potentially both assisting and hindering members in dealing with changes in organisational identity (Fiol, 2002).

In line with this process-oriented perspective, Pratt (2012) favours the term *practising* identity, in contrast to terms like identity construction, to infer the 'imperfect and iterative nature of these processes' (p. 30), and Schultz et al. (2012) view organisational identity as 'an ongoing accomplishment' (p. 3) that needs to be seen in its specific context. Building on previous studies, Ashforth (2016) states that 'collective identities emerge from a process' (p. 81), the first stage is 'I think' (p. 81), and then, after negotiation among stakeholders to form a shared understanding, 'we think' (p. 81), and

finally, ‘it is’ (p. 81) as members express the organisation’s identity in and through a variety of organisational core statements, policies and procedures.

In drawing on the few studies specifically examining organisational identity formation, Gioia, Price, Hamilton and Thomas (2010) point to two key ideas emerging from that literature: the impact of both internal and external influences on identity change, particularly when there is dissonance between internal and external perceptions, and the importance of adapting to external influences; and the importance of *self-other* discourses, incorporating both the meanings that the actor assigns to itself and the perceptions of significant others. While suggesting that a range of influences, both internal and external, contribute to the process of organisational identity formation, they comment that little is known about how they interact to influence how organisational identity is actually formed (Gioia, Price, Hamilton, & Thomas, 2010). There are also circumstances when organisational identity change is due to significant events such as a merger (Clark et al., 2010), or when an organisation’s original mission has been achieved (Cannon & Kreutzer, 2018).

The sharp distinction between the social actor and social construction perspectives has blurred over recent years. Scholars have begun instead to emphasise the value of incorporating both perspectives into a richer understanding of organisational identity. Gioia et al. (2010) claim that the social actor and the social construction perspectives are ‘not only reconcilable but mutually necessary’ (p. 35) and that the two perspectives are not so much complementary as working together recursively to generate organisational identity. In moving beyond complementarity of perspectives, Gioia and Hamilton (2016) recommend a ‘structurational’ approach to organisational identity, within which ‘meaning making (via social construction processes), claims making (via social actor processes), and legitimizing forces (via institutionalization processes) all swirl together recursively to produce this phenomenon’ (Gioia & Hamilton, 2016, p. 31).

In an attempt to identify points of convergence between different perspectives, Cornelissen, Haslam and Werner (2016) examined the literature on organisational identity and suggest that there are three key meta-theoretical perspectives – social actor, social constructionist and social identity – each with its specific set of assumptions and concerns. They propose the idea that each of these meta-theories is underpinned by a different root metaphor that then influences how organisational identity is theorised and researched. They contend this results in compartmentalised understandings of organisational identity and siloed research approaches. Their goal in making these root

metaphors overt is to point to possible points of integration and alignment between the various meta-theories. They propose that the social actor meta-theory sees the organisation as having attributes usually belonging to a person, and is underpinned by the root metaphor of personification; the social construction meta-theory sees members creating a mutual understanding about 'who we are' as an organisation and is underpinned by the root metaphor of framing; the social identity meta-theory sees members defining themselves not solely by their individuality but by the category of group members with shared understandings held at group level, and is underpinned by categorisation (Haslam, Cornelissen & Werner, 2017). Having identified the underlying root metaphors, Haslam, Cornelissen and Werner (2017) suggest that there are points of contact between the perspectives, including each being influenced by Albert and Whetten's (1985/2004) central, distinctive, enduring criteria. They reference Ashforth, Rogers and Corley's (2011) approach to integrating the metaphors within one framework and build on it to include a focus on the processes associated with organisational identity formation and change. They refer to their model as a 'social interactionist model of organizational identity formation and change' (Cornelissen, Haslam, & Werner, 2016).

Schinoff, Rogers and Corley (2016) argue that organisational members are capable of understanding that they are involved in the process of creating their version or interpretation of the organisation's identity while also appreciating that the organisation is a social actor engaged in purposeful and self-reflective activity (Schinoff, Rogers, & Corley, 2016). Similarly, Kreiner et al. (2015) examine how members of organisations negotiate organisational identity in challenging times, such as periods of organisational expansion or diminishment. Different from the concept of having multiple or changing identities, they suggest that members stretch their understanding of organisational identity to accommodate tensions while continuing to hold on to particular social constructions of identity – 'expanding identity' and 'restricting identity' (Kreiner et al., 2015, p. 990). They refer to this as 'organizational identity elasticity' (Kreiner et al., 2015, p. 982) and contend that this elasticity reflects the dynamic nature of identity. They suggest that rather than being solely a list of characteristics, identity is experienced by members as various processes of negotiating tensions, which give rise, in turn, to new understandings of organisational characteristics. In this way, they bring together competing understandings of organisational identity (Kreiner et al., 2015).

This convergence between the major perspectives reflects my own experience. In working to foster the organisational identity of Jesuit Social Services I drew on a 500-

year heritage (in line with the social actor perspective) while operating in a contemporary context with organisational members from outside this heritage who actively engage with organisational identity matters (in line with the social construction perspective).

Ontological Questions: Entity or Process?

Ontological questions received little attention until this century (Pratt, Schultz, Ashforth, & Ravasi, 2016b). Since then, there have been strenuous debates on questions regarding the nature of organisational identity and how it is to be conceptualised, right through to questioning its very existence: that is, is it a real thing or is it an 'extended metaphor' (Gioia & Hamilton, 2016, p. 21). Assuming that organisational identity does exist, the core question that scholars then continue to debate relates to how best to represent its essential character, or how it is best construed – namely, as a substantive entity or a dynamic process, 'more "content-based" or "process-based"' (Gioia & Hamilton, 2016, p. 27). In the former, organisational identity is understood to be substantive, a *thing*, an entity with a set of attributes, which implies an understanding of organisational identity as relatively static. In the latter, organisational identity is considered to be process-like, dynamic, in flux, and in a constant state of 'becoming' (Gioia & Hamilton, 2016, p. 30); it is constantly being adjusted and negotiated (Gioia, Patvardhan, Hamilton, & Corley, 2013).

In recent years, there has been a softening of positions by some scholars regarding whether identity is an entity or a process. Gioia and Hamilton (2016) suggest that a complementarity exists between these two positions. As with their treatment of the epistemological issues, they suggest that 'structurational thinking … affords a more nuanced and realistic portrayal of organizational identity as both process and product' (Gioia & Hamilton, 2016, p. 32). For them, gerunds (a verb form that functions as a noun) are useful in portraying the dynamic nature of organisational identity. Terms such as sense-giving, sense-making, learning, negotiating and modifying allow for 'reconciling the paradox of identity as simultaneously content and process' (p. 29). Descriptions of organisational identity that use attributes provide an insight into what members see as key to the organisation's identity, while those that use processes promote an understanding of organisational identity as dynamic. Gioia and Hamilton (2016) draw on Bateson's analogy of an acrobat maintaining balance on a high wire through 'continual correction of his imbalance' (Bateson, cited in Gioia & Hamilton, 2016, p.

32). This analogy suggests that organisational identity is dynamic and always in motion while presenting a consistent image.

Bateson's image of the acrobat on the high wire resonated strongly with me, reflecting an understanding that a consistent identity with specific attributes is able to be maintained because of adaptive, dynamic processes. I am interested to explore how the attributes associated with Jesuit heritage, some which favour process-like activity, might position a community service organisation operating in a contemporary context to maintain a strong organisational identity. I find support for this proposition outside the field of organisational identity in research undertaken in the administrative science arena. Quattrone (2015) examined early Jesuit practices related to spirituality, and accounting and recordkeeping. He argues that the procedural nature of the Jesuits' way of operating connected means with ends in a way that was not fixed, leaving Jesuits free to adapt to the particular contexts they operated within. He refers to the 'Jesuits' commitment to the endogenous dynamism of logics' (Quattrone, 2015, p. 436).

Methodological Questions

According to Foreman & Whetten (2016), while a few studies have looked into how to operationalise and analyse the construct of organisational identity, a full review of research methodologies used in this field has been lacking. In their view, research has been largely conceptual, focusing on issues related to definitions, terminology and differences that are the subject of the major debates in the field. This includes reinforcing the distinctions between the social actor and social construction perspectives. They conclude that researchers tend to use methodologies that reinforce their pre-existing views and assumptions regarding organisational identity (Foreman & Whetten, 2016).

Alvesson and Robertson (2016) believe that limitations in understanding the character of organisational identity (ontology) and how it is best viewed or known (epistemology) have translated into shortcomings in research design, resulting in research findings that are self-reinforcing. In their warning against the tendency of content-based approaches to reify organisational identity, Alvesson and Robertson (2016) argue that if we are too intent on treating identity as an object, we will be unable to see the multiplicity of living practices that produce it. That is, to put firm boundaries around what identity *is* may suit researchers, but it does little to capture the complexity of the phenomenon. When we treat identity as a predetermined, we are likely to introduce shortcomings in research design, resulting in research findings that are self-reinforcing.

Alvesson and Robertson suggest, instead, that future studies in organisational identity would benefit from 'taking a more process, situational, and practice-centred as well power-sensitive view of identity statements and how they relate to other themes in organizations' (Alvesson & Robertson, 2016, p. 176).

The 'power-sensitive' analysis referred to here is prominent in the scholarship that conceptualises identity as primarily discursive, or narratively constructed, though these theorists generally suggest that it is complementary to, not exclusive of, other understandings (Brown, 2006; Brown & Humphreys, 2006; Gioia & Hamilton, 2016; Manuti & Mininni, 2013). In this view, identity is conceptualised as dynamic and as comprising multiple narratives that co-exist in a competitive or complementary way, which are being continually fashioned and refashioned by organisational members as part of organisational life. These are sites where power dynamics are played out. This perspective highlights the struggle between dominant and marginal voices, and whose story dominates, when, and in what circumstances. Claims about organisational identity become arenas for resistance, control and hegemony (Brown, 2006; Manuti & Mininni, 2013). Watson (2016) suggests that reference to an organisation's identity can conceal the reality that there is no unitary, shared sense of identity. He argues that making claims about an organisation's identity is itself an act of power and cautions that this allows identity to be used as a 'rhetorical and political device, as a matter of managerial manipulation, venturing delicately to put people together in a bundle' (Watson, 2016, p. 130).

I am alert to the power dynamics that underpin the authorisation of identity claims: does this authority rest with the Jesuits, with the board and leadership of Jesuit Social Services, or with staff? I am interested in the issue of power particularly in relation to who gets to claim if Jesuit Social Services is 'Jesuit enough' or 'Ignatian enough'. My autoethnography explores the current tussle in play regarding this contentious issue – namely, there are a few Australian Jesuits who, though not close to Jesuit Social Services or its work, exercise their power as Jesuits to question the authenticity of the organisation's Jesuit identity; on the other hand, I am aware that I use my power as organisational leader to claim the Jesuit identity of the organisation.

The Communication and Experience of Organisational Identity

An organisation's identity, whether understood from the social actor or social construction perspective, is consolidated through various modes of written, verbal and

visual communication as well as material artefacts and embodied experiences. Organisational founders and leaders also play a key role in developing, nurturing and directing organisational identity (Pratt, Schultz, Ashforth, & Ravasi, 2016b).

Schinoff, Rogers and Corley (2016) propose that the content of organisational identity is communicated by 'saying, showing, and staging "who we are"' (p. 222). *Saying* includes communicating content about identity, through written or verbal means. *Showing* includes demonstrating particular behaviour or displaying materials that communicate identity related content. *Staging* includes providing a platform for members to experience or act out the organisation's identity, which can be stronger than merely telling or showing – for example, participating in particular rituals. Schinoff, Rogers and Corley's (2016) concept of 'staging' is particularly appealing for its ability to incorporate emotional and bodily experience, which is important in the Ignatian tradition.

As Harquail and King (2010) remind us, the communication of identity is never only verbal or textual, but expressed in the material histories of organisations and in the embodied experiences of members, clients and stakeholders. Identity, Harquail and King (2010) propose, is also constructed through feeling. They suggest that organisational members' understanding of organisational identity must be substantiated by their embodied experience. They draw on embodied cognition theory, which proposes that people's ability to process information and acquire knowledge is a function of bodily experience, and not limited to verbalising conceptual or abstract knowledge. They argue against reliance on verbal-only descriptions of organisational features that speak to identity and argue for the inclusion of 'a range of embodied and abstract knowledge' (Harquail & King, 2010, p. 1621). They suggest that embodied 'substantiation' should be recognised alongside what is central, distinctive and enduring as a necessary fourth criterion for members' knowledge of organisational identity.

The importance of the broader physical world, not solely products but also practices, has received attention in recent years. Watkiss and Glynn (2016) point to the early history of organisational identity with its focus on material objects, such as branding, logos and buildings, as mechanisms for expressing organisational identity. In their view, this approach was overtaken by a focus on meaning at the cost of acknowledging the importance of the material world. In examining the relationship of materiality with organisational identity, Watkiss and Glynn (2016) argue that particular processes and associated mechanisms are used by members to build and express organisational identity. Organisational products are used to categorise the organisation;

artefacts are used to symbolise what the organisation stands for; and practices are used as ‘performative repertories from which organizations can construct strategies of action that instantiate their identity’ (p. 327). I am interested in embodied cognition because of my own experience of ‘knowledge that remains ineffable, residing in our bodies, perpetually escaping our ability to articulate it fully in words, yet still forming a significant part of our understanding’ (Harquail & King, 2010, p. 1620).

Pullen and Rhodes (2015) argue that acknowledgement of the role of embodied feeling is important if we are to reframe identity as a process of ethical engagement with others. They draw on a feminist theory of ethics that contests the traditional dominative masculinist approach to enforce organisational unity through imposing ‘control, rationality and order’ (p. 161). Within in their revised ethical framework, organisational identity may instead be rethought as something that ‘arises from the interaction between people, the embodied effects and affects of that interaction and the indissoluble relation between thinking and feeling’ (Pullen and Rhodes, 2015, p. 161).

Abstract and complex concepts, including beliefs and values, are often intrinsic to organisational identity and there can be a tension in promoting an organisational image to stakeholders that is clear and appealing, while at the same time facilitating organisational identification (Bartel, Baldi, & Dukerich, 2016). Echeverri (2018) discusses this issue of organisational marketing, as an aspect of communication, in the context of the organisational identity of non-profits. He argues that the coherence between identity and all aspects of organisational activity can be reflected in the organisation’s approach to marketing. In his view, community service organisations are best understood as entities that ‘produce and offer sociality as realized in collaboration with clients and in the contexts of social networks’, rather than entities ‘offering services for people in need’ (Echeverri, 2018, p. 283). In this sense, prioritising social connection must be central to organisational identity, which is then reflected in how the organisation represents people engaging with its services by, for example, promoting ‘a sense of belonging rather than of receiving help’ (Echeverri, 2018, p. 296); and how it presents itself to the public, for example, in promoting ‘legitimacy and trust’ over other attributes such as ‘being “professional” and “effective”’ (Echeverri, 2018, p. 297). This points to the connection between a community service organisation’s purpose and how it gives expression to this in areas outside its core activity, where its social purpose is reflected in its communication and marketing. The model I develop reflects the importance of ensuring coherence between foundational understandings, organisational purpose and the

approach to all activity, including how it markets itself and represents its purpose and program participants in the public sphere.

The literature on how identity comes to be articulated and communicated also calls attention to the role of individual leadership, including the influence of founders, in cultivating member investment in an organisation's identity. Aitken's (2019) systematic review of the literature identified leadership as important in 'fostering organisational identity and followers' organisational identification' (p. 84) through what leaders say and what they do, particularly in times of upheaval or change.

In viewing organisational identity as socially constructed, Van Knippenberg (2016) argues that leadership is also socially constructed – either by leaders and members shaping organisational identity to reflect characteristics of the leader, or by the leader presenting her/himself in a way that aligns with the organisation's identity. He further argues that 'perhaps nothing gives greater credibility and legitimacy to identity claims than the perception that one embodies the shared identity, because it is this very perception that gives one legitimacy and credibility in one's claims about the nature of that identity' (Van Knippenberg, 2016, p. 343).

Leadership in relation to fostering organisational identity is not the sole province of those with formal leadership roles. Schinoff, Rogers and Corley (2016) use the term 'identity custodians' (p. 221) to describe members, not only those in leadership positions, who are seen by others to give expression to the organisation's identity through their views and actions, whether as part of or outside their organisational role. I am interested in this concept and often use the term 'culture carriers' to describe staff who bring the organisation's identity to life through their words and deeds. The idea that leadership is not the sole province of those in formal leadership roles is one that resonates with the Jesuit understanding of the importance of each person's living out the values and taking responsibility in her/his context. The 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g) support this understanding. They have been likened to a manual whose purpose is to help people see the presence and action of God in their lives, in order to make a choice to live in accordance with this understanding (O'Malley, 2013).

The Ignatian leadership literature identifies characteristics required for effective leadership (Broscombe, 2018; Cornish, 2018; Garant, 2018; Guibert, 2018; Lavin, 2018; Lecourt & Pauchant, 2011; Lowney, 2003; McCallum, 2018; McCallum & Horian, 2013; O'Connor & Myers, 2018; Rothausen, 2017; Tran & Carey, 2018). There are specific attributes that are highlighted in Ignatian heritage, particularly the 'Spiritual Exercises'

(Ignatius of Loyola, n.d./1996g). Boscombe (2018) refers to an orientation of the person: 'authenticity, friendship with God, freedom, humility' (p. 16) and what this approach will produce. That is, '"helping souls", magnanimity, *discreta caritas* [discerning love], discernment, operational wisdom, openness to change, and consolation' (p. 16).

Along similar lines, key themes have been identified in the literature on discernment regarding leadership attributes: capacity for discernment, self-awareness, *magis*, humility (Lavin, 2018; Lowney, 2003; O'Connor & Myers, 2018; Rothausen, 2017; Tran & Carey, 2018). This understanding provides a useful backdrop to the exploration of how Jesuit identity is expressed in the human spirit of organisational members.

Lecourt and Pauchant (2011) identified six domains where the relationship between Ignatian spirituality and managerial practices become evident: decision-making, respectful human resource management, keeping a focus on the mission of the organisation, sense of social responsibility to all stakeholders, how they view their own career development, and the meaning of work. This literature has relevance when considering Jesuit identity and its application to an organisation's business processes.

Scholars also point to the role that a founder can play in relation to organisational identity. Boers and Ljungkvist (2018) state that when an organisation draws on and makes claims about its founder, the founder becomes an identity referent. This can be used for various strategic purposes. It can function to promote particular values in the organisation and to maintain organisational identity. Boers and Ljungkvist's (2018) concept of the founder as an identity referent is consistent with how the Jesuits actively draw on their founder, Ignatius of Loyola. In this study, I also draw on Ignatius as an identity referent, specifically by examining his life and spirituality with the purpose of identifying elements that speak to the identity of a community service organisation operating in this tradition.

Organisational Identity in Non-Profit Organisations

The literature relating specifically to non-profit organisations underlines the importance of a number of issues emerging from organisational identity literature overall and provides insight and context to particular matters relevant to my research. Organisations in this sector are characterised by multiple identities (Young, 2001). Scholars have looked at various matters in relation to this characteristic, including strategic direction, leadership and governance (Brilliant & Young, 2004; Golden-Biddle & Rao, 1997; Yip

et al., 2010; Young, 2001). Research has also considered how identity is layered within non-profits (Elfving & Howard, 2018) and explored specific questions that relate to faith-based hybrid organisations (Yip et al., 2010).

Young (2001) states that the reality of juggling multiple identities brings various strategic dilemmas to the fore, which, if not resolved, will impact on the organisation's success. He refers to organisational identity as the entity's '"north star" by which to navigate its course of action and shape strategy for the future' (Young, 2001, p. 155). He argues that when organisational identity is unclear, the ensuing lack of certainty regarding strategy and structure leaves the organisation subject to pressures emanating from the operating context and vulnerable to poor decision-making.

Brilliant and Young (2004) agree that a strong organisational identity buffers organisations against challenges in their environment and argue that if a coherent identity that can drive strategy is to be achieved, alignment between various stakeholders and the purpose of the organisation is required. They note that 'flexible adaptation and revisiting of identities' (p. 42) is responsible for organisational resilience but if overdone may put the core organisational identity at risk. Brilliant and Young (2004) suggest that it might be necessary for organisations to prioritise one identity 'as the overall "meta-identity" at any given time, and preferably over long periods of time' (p. 42). On this point, I am interested to note the finding from Onishi's (2019) recent research into non-profits with hybrid identities, which points to the potential power and 'mediating role of social identity' (p. 260). Her study found that when organisational members detect tension between the organisation's social and commercial purposes, 'internal forces from social identity consistently suppress external pressures from commercial logic' (Onishi, 2019, p. 260).

Other issues arising from navigating hybrid identities, including faith-based identity, include questions of governance and leadership. In relation to governance, Golden-Biddle and Rao (1997) maintain that organisational identity shapes how key roles in an organisation are constructed and ultimately determines how the board functions. They suggest that board members of non-profits with hybrid identities may experience *conflicts of commitment*, rather than *conflicts of interest*, when faced with competing aspects of the organisation's identity (Golden-Biddle & Rao, 1997).

In relation to leadership, Yip et al. (2010) argue that when faced with members' multiple and differing social identities, the leader must find ways to bridge identity boundaries if the organisation's purpose is to be achieved. Their case study of a faith-

based non-profit identified particular challenges the leader faces: managing the faith-based identity of the organisation along with other identities of the numerous stakeholders, including governments, that provide funding on the basis of the services being for the broader public; and managing different interpretations of what it means, in practice, to be a faith-based organisation. The latter point is pertinent to my study given my experience of encountering different understandings from various stakeholders about what constitutes Jesuit identity in our context and how this should be expressed.

In relation to the challenges identified in their study, Yip et al. (2010) suggest that storytelling can play an important role in a non-profit organisation: engaging diverse groups of people; building shared understanding; bringing values or abstract concepts favoured by non-profits to life (for example, respect and integrity); and creating a collective identity. They argue that when leaders operate in such a way as to bridge boundaries, the effects can be felt beyond the organisation. The transformative power of this style of leadership is of interest to me; so, too, is the role an organisation can play in strengthening civil society when it operates in this way.

In a variation on the theme of hybrid identities of non-profits, Elfving and Howard (2018) argue that organisational identity can be layered, or represented as core identity and collective identity. Core identity is understood as deeply connected to the organisation's vision and mission, and resistant to change. Collective identity operates at a more superficial level facilitating greater engagement with partners, stakeholders and the broader environment (Elfving & Howard, 2018).

Mitroff and Denton (1999) conducted research into spirituality in the workplace through a two-year empirical study based on interviews and questionnaires with senior executives and managers. They found that people distinguish between religion and spirituality and generally respond positively to the latter but not the former. Their research found that spirituality acts to integrate all elements of the person, is viewed as interconnectedness with others and the wider world, and is integrally connected to purpose (Mitroff & Denton, 1999).

The literature relating to organisational identity and non-profits, including faith-based organisations, is relevant to my research in a number of ways. I am struck by the prevailing understanding that organisations have multiple identities that need to be managed or reconciled. Given the various stakeholders in play in my context, managing layered/multiple identities is pertinent to my research. I note the research underlining the

influence of the external environment on organisational identity. This resonates with my experience of the impact of neoliberalism and associated practices on our sector.

In the face of different stakeholders' expectations, I am interested to determine if a particular organisational identity (Jesuit), by virtue of its core attributes, could embrace these differences and incorporate them in an overarching organisational identity. I am also interested to understand the kind of model that could assist in building that unifying identity.

Conclusion

The literature review highlights that organisational identity as a field of study is a recent area of scholarship. The review outlines the key debates and emerging understandings in the field. It identifies a number of matters pertinent to my research aim.

Epistemological issues dominated the organisational identity field until the early 2000s. The key debate revolves around whether organisational identity is best conceived from a social actor or social construction perspective. In recent years, points of convergence between the two perspectives have emerged, which can be seen, for example, in Gioia and Hamilton's work (2016). A similar ontological divide has centred around whether the very nature of organisational identity is best conceptualised as *entity* or a *dynamic process*. Points of convergence are emerging in this domain too (Gioia & Hamilton, 2016). These core concerns of organisational identity scholars align with my central interest in this study about organisational identity and how it is fostered. In answering my research question about fostering Jesuit identity in a community service organisation, my study aims to render insights that will make a contribution in relation to the growing points of convergence between perspectives (ontological and epistemological).

I have also outlined the important role of communication and the participation of individuals in negotiating, shaping, consolidating and communicating a collective identity. The content of organisational identity is communicated through narratives that are spoken, written and performed, but also materially embodied and felt (Harquail & King, 2010; Schinoff, Rogers, & Corley, 2016). It is important to remember that the formation of identity is arrived at through processes of negotiation between people. It is often fostered by people in leadership roles, including original founders (Schinoff, Rogers, & Corley, 2016) and complicated by organisational hierarchies or power

structures, which work to determine what stories are told and by whom, or whose identity claims dominate (Watson, 2016).

These themes appear in my autoethnography in Chapter 5, and I take these findings into account in my model for fostering the Jesuit identity of a community service organisation in a contemporary context, which I present in Chapter 7.

With regard to methodological issues, my examination of the literature identified a few matters that are relevant for my research and support my choice of methodology. In particular, I note support for a more engaged approach to research (Alvesson & Robertson, 2016), including seeing researchers situated in organisations they are studying, and the value of developing theories that inform, and are useful to, those engaging with these issues in daily practice (Watson, 2016). Being situated in the organisation, and choosing autoethnography as my methodology, allows me to address these methodological concerns.

Finally, this review identifies a gap in the literature related to the cross-cutting themes of Jesuit heritage and organisational identity specific to the community sector and highlights a further area where my research aims to make a contribution.

Having examined the operating and knowledge context for my research, I now move on to review my personal experience. In Chapter 5, I review my life to trace antecedents of the material I currently use to foster Jesuit identity in the course of my work. I explore and provide depth to this material and also note new insights that contribute to the model I present in the Chapter 7.

CHAPTER 5

Experience

The antecedents of my current understanding of Jesuit identity do not come from the recent scholarly study undertaken for this thesis. Rather, they lie buried in the roots of my own life. Many are etched into my being through lived experience that has been reflected on, refined and reimagined. Others are more like a whisper or a promise of something to be further developed. They are loose threads, half-sewn threads, threads yet to be brought into a picture that will not so much serve as a blueprint for fostering organisational identity as a compass providing orientation for that purpose.

As outlined in Chapter 2, I approach my personal data chronologically, moving through two phases of my life covering forty-five years: pre-Jesuit Social Services; and Jesuit Social Services. Each phase comprises three Acts relating to a particular period of my life, from the time I went to India as a nineteen-year-old until the present day when I am sixty-five years old and CEO of Jesuit Social Services. Within each Act, I present a number of scenes where I explore experiences, events or insights associated with a particular theme. Each period of my life is different, not solely because of the lessons I learned in each era, but due to how I experienced them, which has influenced how I present each Act. In reflecting on this, I did simple sketches and jotted down a few words about my experience of each era and how it impacted on me, and a colleague created paintings of these sketches (Figure 5.1).

Act One, India, was a comparatively short period of eight months, but the lessons came in rapid succession and made a big impact on me. Act Two, *Hesed* Community, was a highly influential sixteen-year period when important lessons were being clarified and key insights were taking on greater significance. Act Three, Transitioning to Professional Life, represents a period of ten years but is a shorter Act. My experience at this time did not have the impact of previous eras, but its importance lies in the way that I learned to translate and consolidate earlier experiences into a different setting. Act Four, Arriving at Jesuit Social Services, covers a tumultuous three-year period where I experienced a number of certainties and underlying assumptions being blown apart in this new context. Act Five, Arriving as CEO, represents a period of four years where I started to regain balance and create order out of my experiences. Finally, Act Six, Going Deeper, Going Broader, covers twelve years to the present. I experienced this era as a

time of consolidation of earlier experience and an evolution of my understanding of fundamentals, including some whose origins date back to India.

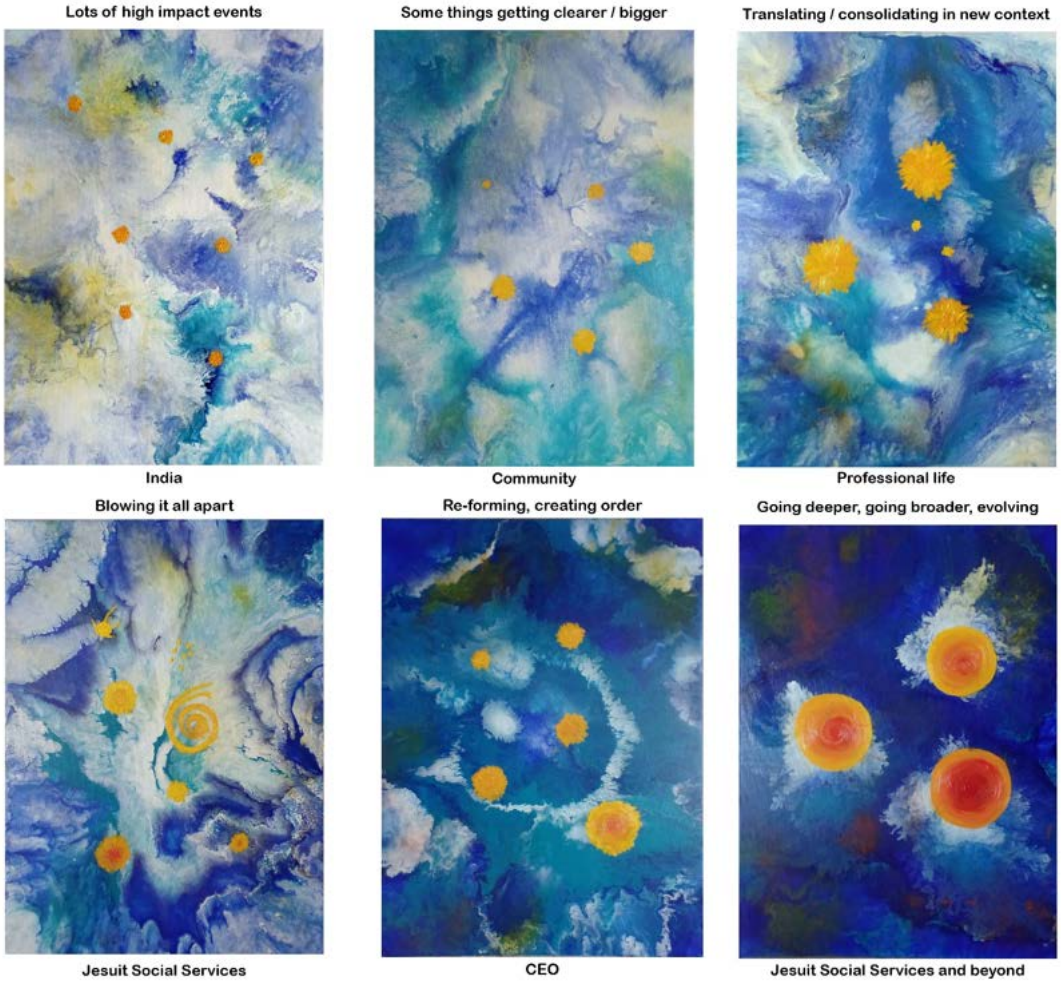

Figure 5.1 Experience of the eras

Over the forty-five-year period covered in this chapter there were innumerable experiences, events, stories and insights that informed the knowledge that I currently use as CEO to foster the Jesuit identity of Jesuit Social Services. This chapter draws on this experience to trace the development of that knowledge, specifically the seven 'elements' from Jesuit heritage that I intuited, or the Way of Proceeding framework I developed. I see this knowledge as intrinsic to the operationalisation of Jesuit organisational identity. My understanding has continued to develop over the years, but when I first identified the elements, I understood them in the following way: *gratitude* (stemming from an understanding that everything is gift); *relationship* (being in grounded relationship with people on the margins); *doing* (taking action in the world); *influencing* (addressing

structural justice); *discernment* (being reflective and strategic); *magis* (striving for more, going the extra mile); and *contemplatives in action* (being reflective in the course of everyday life). The Way of Proceeding framework (see Figure 5.2) comprises three domains – Human Spirit, Practice Framework, and Business Processes – which are further elaborated in Chapter 6. The domains reflect my understanding that the organisation's values and purpose are expressed through its people, practices, and processes, and that there is a relationship between these domains. For example, our practice is supported by paying attention to the human spirit of our staff and ensuring our business processes reflect our social justice values.

In the process of searching my experience for features pertinent to the Jesuit identity of a community service organisation, I remained open to discover additional elements and features that should be brought forward to inform the model I develop. The Final Reflection and Action sections at the end of each Act capture the lessons from each period. The Evaluation sections at the end of each Act specifically track the development, and enhancement, of existing knowledge – namely, the seven elements and Way of proceeding framework during each period. This evolving knowledge contributes to the LOGoS Tree Model I develop (see Chapter 7), providing both a theoretical and a practical tool for making sense of Jesuit identity as a *practice* (rather than, for example, a personal attribute). The experience presented in this chapter is critical to the task of showing how I came to elaborate my model of organisational identity in the context of Jesuit Social Services. The chapter shows how I gained an inner understanding through lived experience and the challenges I encountered along the way. Chapter 7 will bring this experience into dialogue with findings emerging from my reflective review of Ignatian and Jesuit heritage in Chapter 6. In the current chapter, I adapt the Ignatian Pedagogical Paradigm to help shape the approach I take to the personal data. This ensures it is situated in context, reflected on in order to penetrate its deeper meaning and to identify factors that moved forward with me to the next period, and then evaluated to assess the development of the elements during the period under discussion. I use fictitious names.

Phase One: Before Jesuit Social Services

Context

I'm the youngest of six children (seven counting my brother who died before I was born). We're part of a big extended family with dozens of cousins. Irish stock. I attended a Catholic school for my primary and secondary education.

> I hear Mother Gabriel's Irish voice. She has me spellbound. I'm in grade four. I stop fidgeting in the back row. My plaits are heavy. My face is hot. 'Jesus wept', she tells us – pleads with us to understand – when his friend Lazarus died. Her eyes are moist. It breaks through everything else I've grasped so far about God – about his wanting me to be good, to be polite, to make sacrifices. This is something else. A passionate God, mad on us. Something is very quiet inside me. (Edwards, 1991, p. 126)

Something clicked for me. But it's a lesson I have to re-learn over and over, maybe for my whole life. God loves me as I am. I'm a striver; I put in effort. But the experience with Mother Gabriel is telling me that it's not all about me and my effort; rather, the initiative is with God.

Faith and family were firmly interwoven as I grew up. I was lulled to sleep each night by the sound of my parents saying the rosary. Mum looked out for people whom others overlooked; Dad imparted a strong sense of justice. Neither had any time for anyone putting on airs and graces. But by the time I left school, I was ready to leave the Catholic Church. I viewed it as a patriarchal, out-of-touch institution that had little relevance for me. I thought social work might be the answer. By the end of second year at university I was completely disillusioned.

Looking back, I think I was depressed, maybe not clinically, but lost and unhappy. This was 1974. I was nineteen. I had walked away from the Catholic Church, and I didn't believe in God. I was a strong feminist, critiquing gender roles, patriarchal structures, capitalism. I was exploring alternative lifestyles. I became vegetarian. I discovered yoga. I toyed with eastern spirituality. I wanted out of the shallow, self-indulgent, consumerist life of Australia. I took myself to Calcutta,[1] India. This was the beginning of a lifelong search for meaning and purpose.

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[1] Now referred to as Kolkata. In this thesis I will mainly refer to the city as Calcutta as this was the name of the city at that time.

Act One: India, 1975

Context

Act One covers a period of eight months in my life when I lived in Calcutta. In what now strikes me as a curious choice, I went directly from the airport to volunteer at one of Mother Teresa's homes for the sick and dying. I was a macrobiotic, vegan, yoga devotee; the only book I brought with me was *The Bhagavad Gita* (not that I'd read it at that stage). I'd walked away from the Catholic Church and straight into the arms of Mother Teresa of Calcutta and the order she founded, the Missionaries of Charity. The Order has a particular commitment to offering basic care to the poorest of the poor. They eschew professional roles. They do not critique structures of injustice or get involved in advocacy. They live a very strict, frugal lifestyle.

I worked with sick and dying people – initially with men, and later children. This was a profoundly formative period of my life. It was in this era that my eyes were opened to the suffering and injustice in the world, where I was confronted with my own weakness, and where I regained my faith. I would never be the same again.

> Calcutta's like a big, sprawly country town. Faded, broken, low-slung, but so busy. People everywhere – walking, lying, sitting, begging, urinating, selling, pumping water, avoiding cows, running and jumping on to buses that are already tilting their way dangerously through the streets. The activity assaults you. Life, life, everywhere. Just beneath it, overlaying it, marbling it, is death, pain, despair. (Edwards, 1991, p. 129)

After eight months, I returned to Australia. I had contracted tuberculosis and become very unwell. I went home to recuperate.

Scene One: Seeing the Person in Front of Me

Context

I'm nineteen. I arrived in Calcutta two weeks ago and since then, I've been working here as a volunteer in this home for people who are sick and dying. I'm working in the men's ward. My tasks are to provide basic care for them – assisting with bathing and feeding, handing out medicines, making beds, and generally spending time with the men. It's been mind-blowing. I'd never really known a poor person before, let alone fed one, touched one, washed one. And here in this one building there are hundreds of poor,

dying, disabled, destitute men, women and children – with disfigured bodies, blank eyes, no possessions – lying row after row on mats on the floor. Today's the official opening of this building that has been donated to the Missionaries of Charity.

Experience

> Everyone was in a flap. All the men were given new shirts and lungis and new sheets and blankets and the whole place was revitalised. Had to supervise the men into their clothes. One of the crippled guys I wash indicated he wanted a new shirt so I started to change him and two postulants helped. Anyhow, it was awful because we were trying to manipulate him into it and he was in the most incredible pain – and the terrifying thing about it all was that although I kept stopping and wondering what to do about it, I never questioned the overall thing including why does he have to put it on. Mother Teresa came up and saw what was happening and very gently said, 'Sisters, there's no need for this. Take it off him. This is crucifixion. Put something loose around him. There's no need for this at all.' (Diary, 21-1-75)

I felt sick. I felt guilty. How could I have lost sight of the man in front of me? I saw his suffering, but I got caught up in what I thought was my job. And then Mother's intervention. She gave a very clear direction to us. But kindly and gently. At the opening, I slunk into a seat alongside the other workers. Andrew, a young American Jesuit, introduced himself.

> He told me that Mother had said to him that we're all working for the poor and no one else – and to remember that at all times, so if you see a need you deal with it regardless. (Diary, 21-1-75)

My first opportunity to enact this lesson came later that day when I saw staff treating one of the patients roughly.

> I suppose because of what happened today I said 'no' and told them to be gentle – I'd never have dared to do that because I'd have felt interfering, and the miraculous thing was that they *responded*.[2] They'd got sucked in just like I had –

[2] In my original diaries, emphasised words were underlined, but I use italics in the thesis.

> they were carried away. So people *do* need to be told sometimes. (Diary, 21-1-75)

Reflection

I was a nineteen-year-old girl. I'd never seen poverty, let alone poverty like that. I was there to help 'the poor', and I saw my role as helping the Sisters. I'd entered their world. I was in awe of them. They were the experts. In hindsight, I can see that my priority then was to be 'helpful' – and I prioritised what I thought would be useful to the Sisters over and above the patients. I got caught up in a task. I had some feelings of discomfort but didn't pay proper attention to them. I didn't question the larger purpose of what I was doing and lost sight of the person. Mother came, saw, spoke. Suddenly everything was clear. She shone a light. I got perspective. I felt shame. It was beginning to dawn on me that each person is a human being just like me. I need to see the person in front of me – to be present in the moment; to be clear about what I'm there for and what I'm trying to do.

I was starting to see that we're all responsible; that it's important to speak up and challenge bad behaviour and poor practice. But there's a good way to do this. Mother spoke gently. I learned that it is possible to reprimand people in a way that preserves their dignity as much as possible. She saw the whole picture – the man in pain; three inexperienced young women doing what they were told to do, in an unthinking way; the pressured environment of preparation leading up to the opening. She saw all these things and put our actions in context. These were important early lessons: seeing the actual person before me, as a person just like me; tuning into reality as it is, not how I would like it to be; being clear about why I'm doing particular tasks; taking responsibility for what I see; treating all people with kindness and compassion, including those who get it wrong as they try to help others.

Scene Two: The Power of Relationship

Context

I'm now working at a different location on the outskirts of Calcutta as a volunteer in the ward for babies and young children. So many sick children, many abandoned, lying in cots pressed together in rows. So much need. Day after day, children arrive here in the nursery. The Sisters pick many of them up from railway stations where they have been living. Others are brought here, or somehow turn up. So many are without anyone else in

the world. Since working in the nursery, I have developed strong relationships with many children, in particular with Sankina. She was near death when we first met and I took her under my wing.

Experience

I come down to the nursery in the morning and find that a number of new children have arrived overnight. Many of them are too young to tell us their stories – what's happened to them, to their families, where they've come from. But when I sit with the nun responsible for putting information into the intake register and listen to the stories of the newly arrived older children, I get a glimpse into their backgrounds. These eight-to-twelve-year-olds give voice to the untold story of the younger children.

> 'My mother and father hanged themselves at the railway station'; 'My father died and then my mother begged for a while and then she died too'; 'My father killed my mother; someone killed my father'; 'I got separated from my family as we were coming from Bangladesh'; 'My parents took poison', etc. etc. (Diary, 27-6-75)

I listen to story after story of loss, violence, pain. I'm overwhelmed by the sheer volume and depth of suffering. I'm learning that children's suffering doesn't exist in isolation. It's connected to what's happening in their families and their broader circumstances.

> When you ask about the children's parents you're often told they're in one of the other homes for the dying. What hope is there? (Letter home, 5-3-75)

My eyes are being opened. I can see there are layers to people's suffering. Layers of injustice. Before Calcutta, the closest I had been to death was watching someone die on television. In real life, I'm struck by how close death is to life.

> The little girl I nursed yesterday who was all blown up with fluid was taken to hospital yesterday and died. It quite shocked me. Yesterday she seemed so alive – the way she snuggled into my neck and kept her arms around me – she didn't seem as lethargic as the others – and so miserable because her mother hadn't come to see her. (Diary, 5-3-75)

> There's a little girl, Anu, who's six and her sister is about three. Anu climbs from cot to cot until she gets to her sister's and there they sleep, arms around each other. Before lunch today everyone was in bed, but for some reason I went up to Anu, who hadn't been eating, who'd had the shits and was pretty miserable, and asked her if she wanted anything. She didn't so I put my arms out to lift her up and said 'Asu' (come) and she very happily came. I knew she loved to be nursed. So I cuddled her for a while and talked to her but it was so hot with her body against my stomach, and my prickly heat rash was sweating and burning. So after about 10–15 minutes, I put her back to bed and fanned the children. She didn't cry or anything, but she'd have loved me to hold her some more. Well, I got to work in the afternoon and Anu was on oxygen and then she was gasping and then very quickly died. Really, I was shocked – I kept saying, I don't understand, which I don't. She seemed so alive – I still expect people to be unconscious or gasping for days before they're ready to die. Death is very, very close to life. It shows how sick some of those children must be. (Diary, 4-6-75)

I feel bad that I didn't keep cuddling her. It wasn't going to stop her dying but it would have comforted her. The human need for love and connection, especially for a child, is so strong. But relationship is a two-way thing. I thought I would be the carer, the giver here. I can see that I'm learning much from them.

> It's an equal relationship. You may be able to help them physically but they are teaching you all the time what love is, what pain and patience, and joy and sorrow are. (Diary, 14-4-75)

One of my most powerful lessons came from Sankina.

> I love Sankina. When I first changed her nappy I looked aghast at the folds of skin that hung loose around her thighs and buttocks. She lay lifeless in her cot all day. She weighed less than nine pounds and we guessed she was about two. I was determined to see a spark of life in her and I spent hours holding her, singing to her, looking into those vacant eyes. Then it happened. One day she smiled at me. Her eyes engaged mine. She was alive. Right on top of my ecstasy came a wave of shock. She had a mouth full of teeth and suddenly looked about sixty!
>
> Her family came to visit. They're plump! They told us she's four-and-a-half. We learned that they had kept her like that for begging. I feel sick. I am outraged. (Edwards, 1991, pp. 129–130)

Slowly, Sankina began to blossom, and with that she learned to make her needs known. I was at a loss about how best to respond.

> Sankina really has come on and with me she'll really laugh, and even clap her hands sometimes. But I *must* feed her (no one else), I must not carry another child and I must not put her down after she's fed, even to get her milk. She *screams*, arches her back and hits out – she's inconsolable till I comfort her. (Letter home, 13-5-75)

> I'm not feeling so self-righteous tonight. Sakina's mad on me. She screams if I go out of her sight. She grizzles the whole time I'm with her. She wants to eat me. I'm going mad. I'm exhausted. (Edwards, 1991, p. 129)

Reflection

I was getting a close look at reality – life as it is, not filtered through a movie screen or words on a page. These experiences assaulted me. I had no framework or mental map to make sense of them, no prior history to set them against in order to test my understanding. I was waking up. This is how people live. This is how people feel. This is how people suffer. This is how people die.

The nursery was a furnace and its fires were recasting me, burning images into my brain, searing fundamental lessons into my soul. I was tuning into the fact that the person in front of me isn't the whole picture after all. Their life chances are nestled in their family circumstances, and these are nestled in the circumstances that lie well beyond their control. Poverty and disadvantage have deep roots.

Studying social work, I'd learned about attachment theory and how the human need for love and connection, especially for a child, requires a consistent, long-term commitment. Here I saw it played out. I was gaining an insight into the impact on children of abuse, neglect and trauma. In being faced with their need and pain I was learning about the reciprocity of relationship. I knew it wasn't right to ignore or distance myself from the children, but my genuine attempts to show love and care seemed to be creating more pain. I was gaining insight into my inner world and was confronted by the power of my emotions. I was discovering things are not as straightforward as I'd thought. I longed for guidance.

But that's not all that was happening. Beneath the sense of assault, the poignancy of these experiences was tenderising my heart. I saw, and felt, the importance of

relationship, present even in its absence: an absent mother, a nearby sister, a worker who put out her arms, a worker who moved on.

Scene Three: Care – Quality People, Quality Systems

Context

Mother Teresa's vision is to offer basic care and love to 'the poorest of the poor'. Most Sisters come from poor backgrounds themselves and are untrained. The staff they engage to assist in their work are poor people from the local area, who are also untrained.

Experience

Being with people, really with them, is important in its own right. You go beyond the externals, the labels, and you start to see the specific needs of each person, and not just what you imagine these might be. You see people in their reality. So it's also the right basis for anything that follows.

> One of the volunteers pointed out to me last night that there's a group of 'mad men' that, because they've been labelled that from the beginning, we just haven't paid proper attention to. It's really terrible (and frightening) to think of the patterns you can slip into by not thinking. Today I started trying to be more aware of them – as *humans*. (Diary, 13-2-75)

The people I'm meeting and the circumstances they're in are so removed from my life back home. The scales are falling from my eyes. Some lessons are coming hard and fast. Others are like a slow dawning … *these people are human, just like me; just like me*. With this growing awareness came the question about how best to respond. By tuning into reality, I'm starting to see the poor level of care provided and, worse than that, the abuses of power.

> I was cross today. None of the Sisters was here and the women just wouldn't work. Kids sitting in pools of shit, others crying, wanting water or to go to the toilet and all the women were just standing round talking. (Diary, 29-5-75)

I'm seeing people retreat from relationship for all sorts of reasons. Laziness, lack of skill, fear.

> Something is wrong here – the Sisters are continually cleaning, cleaning, cleaning and when I said to a young Sister today that *I'd* clean and she could be *with* the children, we talked and talked, until finally the true reason for her eagerness to clean came out – she was scared, she said she didn't know what to do with the children. (Letter home, 25-3-75)

Being present, being attentive and kind are essential. There's one local woman who shows me that it is possible to be good, to act with integrity, in any circumstances: 'I just love one woman worker, Margina. She's so gentle and she's kind and attentive to all the children' (Diary, 13-4-75). But this is rare. Until now, I'd never thought beyond how we should respond as individuals. Now I see that most of us need help to be our best and to do our best.

Reflection

I was naïve, but gradually my understanding was expanding. I began to experience, and to understand, the connection between the children and me. My heart was touched. I was drawn to heal, to love, to comfort. I saw the importance of having a direct relationship with the children unmediated by the Sisters or the staff. I was learning that the simple desire to care for vulnerable people isn't enough. The needs of the children were so great that it was not possible to address them. I felt overwhelmed by the scale of the problem and the powerlessness of not knowing how best to respond to them. I was disturbed by the poor quality of care and how people were being treated. I saw that the staff were not responding to the real needs that confronted them every day.

Occasionally you will meet the exceptional person who is kind and caring regardless of circumstances – like Margina. But my experience was showing me that to do this work well, you need staff with the right attributes, who are trained, equipped and supported to understand the needs of the people they are working with, and to know what constitutes good practice, and how to do it. I learned that the care is only as good as the people giving it. But I also learned that good processes, systems and strong oversight are needed, and that in their absence there will inevitably be abuse of power, with the more vulnerable people being most affected.

Scene Four: Recognising Structural Injustice

Context

I'm spending my days being exposed to the suffering of people who are on the bottom rung of society. I'm spending many evenings with volunteers from all round the world who are older and more experienced than I am. Occasionally, I spend time in another world that is completely at odds with my daytime experience – one of the volunteers is in a relationship with a wealthy young Indian man, and she introduced me to his group of friends.

Experience

Most nights over dinner, the other volunteers and I talk for hours about what happened that day, trying to make sense of it, locating it in the broader context of our privileged lives back home. We discuss faith, justice, caring for people, human rights, poverty, corruption, our own privilege. In an effort to understand what I'm seeing and experiencing, I read hungrily about India's history, Gandhi, local politics, the history of Aboriginal Australians, resistance movements and spirituality. My understanding of the widespread extent of injustice in our world is growing and I'm trying to work out how I should respond.

> Mother said just think in terms of 'one, one, one' and if you do something for one, your life has been worthwhile. Mother said she wants everyone to have the chance to come and get to know the poor – this is the only way to work on poverty. (Diary, 2-8-75)

I am learning how important it is to form relationships, to engage with people directly. From there, your heart can be touched. It becomes personal. But I'm starting to wonder if that's enough.

Some of the volunteers are critical of the Sisters' approach. They question the value of a crisis response, or short-term intervention, claiming these do little to address people's circumstances. They are also critical of the quality of some of the longer-term care provided to people with mental illness or various disabilities. I agree that how we intervene and improve the quality of care needs more careful thought, but after some months in India, I'm starting to think that caring for people, however good and at whatever scale, is not enough.

> I'd really like to help people, but I'm not sure in what capacity. This work here definitely has limitations. I think that something needs to be done on a larger scale. (Diary, 23-1-75)

Structural injustice hadn't really been on my radar until my time in India. But the scale of human suffering confronting me every day is prompting me to see the systemic nature of the problems I'm encountering. I'm wondering what to do in the face of this: 'After reading about Gandhi I was thinking about the need for organised action.' (Diary, 10-8-75).

I'm astonished by the conversations I'm having with a couple of wealthy young locals I've got to know. They appear to know nothing about the world I inhabit during the day – the country they live in. But can this be true? The starving, ill and dying people I spend my time with during the day aren't hidden away out of sight – they are living on the streets, lining the railway platforms. How is it possible not to see them?

One of them, Denu, came to visit the nursery today. He met a child who is four and weighs just over three kilos.

> He said, 'But how did this happen?' as if he really couldn't see in the lovely world of socialising daily at the club, of alcohol, poolside chatter, tight flared pants and beautifully manicured nails how this could ever have occurred. Their ignorance overwhelms me. He muttered something about the child being under a doctor and I said, 'What doctor? These people don't go to doctors.' He also just didn't seem to comprehend that lack of food and love and attention could be a problem – his face was a marvellous study. (Diary, 7-5-75)

Denu told me he's never been on a bus. His narrow world of opulence and indulgence, shielded from the life of the majority of his fellow citizens, was as much an eye-opener for me as the extreme poverty that confronted me each day. He had no idea that India had a reputation for being a poor country. 'Is it true?' he asked me with great surprise and sadness.

Reflection

My family and school background had influenced me to reach out to people in need. When I first started working with the Sisters, I was focused on direct service as the way to do this. I learned that forming relationships with people was essential to understanding

someone's needs, hopes and desires, and how to respond. Over time, I saw the complexity of many problems and the limitations of attempting to address these solely through a service delivery response. I came to see the importance of addressing structural injustice. I also saw that the rich and poor inhabit different worlds.

Scene Five: Interior Life

Context

The Sisters have a very strict routine. They work long, hard hours. They also disappear for hours every day to pray and to be in community with each other. Witnessing this brought home to me the role of the interior life in supporting the commitment to accompany and serve.

Experience

I see the Sisters working hard. Every day. I'm moved by their generous love and service. I admire their dedication, their endurance and their equanimity. There's the odd one who doesn't treat people as she should, but overwhelmingly, they are calm, hard-working, attentive. How do they do it day in and day out?

I've started to think about the link between my inner life and my actions. I talk with a few of the Sisters about faith and my spiritual search, and about their own faith. These discussions reveal the clear link between their beliefs and their actions. I'm intrigued by it. I admire it. I envy it.

> How I'd love to have their faith! It would give such direction, motivation and purpose. I don't know if their type of work is possible for most people without it. (Letter home, 23-1-75)

I'm reading Gandhi's autobiography – he makes the link explicitly: the more demanding your day, the more you build in time for prayer. I'm also reading *The Bhagavad Gita* and the gospels. I'm reading about the Buddha, and Catholic Worker activists. My spiritual search is showing me that there are many different paths, but fostering the interior life seems a common feature.

I'm starting to get my own insights into God. These reveal a God who extends well beyond the tiny role I had imagined for my own purposes – namely, as a motivator

to support the life of service I was inspired to lead. No, this God is inviting me into a vastness and a depth of relationship I'm just glimpsing.

> Walking up the stairs last night and the sky had the softest pink in it, I felt so small and yet so much a part of the whole universe – there was a stillness and yet a humming of life in the air. (Diary, 28-3-75)
>
> I think it's the best and the loveliest way to see things – everything tinted with God – God is everything and everywhere. (Diary, 1-7-75)

Reflection

As I came to see how the personal attributes of the worker shaped the quality of relationships they formed and the quality of care they offered, I was developing a growing appreciation for the quality of the inner life. I saw a connection between someone having a higher purpose, cultivating a spiritual life, and being faithful, loving and just in relationships. I saw this connection played out among the best Sisters, staff and volunteers. Before India, I don't think I had given any thought to the quality of a person's interior world and how this flows into her life and actions. I had been surrounded by people of faith all my life, but hadn't made this connection.

My adult spiritual journey started at this time. Heartfelt, but embryonic at this stage, it was the great gift from my time in India. I was returning to a belief in God, but sensing that this relationship would lead me to new worlds – interior and exterior. From this point on, I recognised the importance of the human spirit in its own right and as a solid basis for my commitment to social justice.

Final Reflection for Act One

At times I've found it depressing reading my diaries from that time in India. I was so ill-informed, so naïve, so earnest. I'm lucky I survived that period with only a bout of TB to stop me in my tracks. I've had to learn compassion for the young girl full of ideals and impossibly high standards. I've had to remind myself that I was young and that as I wrestled with philosophical questions, such as whether I should kill a mosquito or whether I was entitled to eat food that was not available to poor people, that I was in fact wrestling with much bigger questions about the interconnectedness of all life, power, and privilege.

My time in India was one of the foundational and formative experiences of my life. I would never be the same. I learned the importance of engaging with reality as it is. And I learned that the way to do this is through grounded experience, for I discovered that I could not 'un-see' what I saw – and what I saw was deplorable poverty everywhere juxtaposed with pockets of obscene wealth. I had read about it and seen images of it on television, but the reality of seeing it in the flesh, and of engaging with it through real relationships, cut through any rationalisations, philosophical discussions or emotional defences that I had in place and that my world back home in Australia had constructed. This gave me interior knowledge of the importance of direct experience.

I learned that relationships – seeing the person in front of me as a person and treating each person as I would want to be treated – must lie at the heart of any response. And I learned that the quality of care is what makes the difference for the person in need, and that you have to take responsibility for what you see, whatever your status in the organisation or particular setting you are part of. I learned that if you're not to cause harm, you need staff with the right personal attributes to do the work with compassion and care, and that they must be appropriately trained and well supported to do the job.

India opened my eyes to extensive and interconnected poverty and the complexity of suffering and injustice. I learned first-hand about the glaring injustice of children being born into poverty and how that marks out their future prospects. These experiences provided me with some of my earliest insights into the importance of supporting families in their role of caring for their children.

I learned that the problems of the world aren't 'out there' and of someone else's doing; that we are all interconnected; that I am not exempt nor above responsibility; and that I benefit from the way things are. These insights laid the groundwork for my later understanding of solidarity.

Direct experience, conversation and reading were leading me to be aware of the impact of our actions and the importance of working at many levels, from direct engagement to advocacy aimed at addressing structural injustice. This was new territory for me and my understanding was in its infancy. At this stage, I had little appreciation of the critical role that analysis, discernment and reflection play in first coming to grips with a problem and its scope, and then determining how best to respond.

From the Sisters I learned that withdrawing from the arena of pressing need and activity for times of prayer and community is essential for maintaining the right focus of love and service, and for sustaining long-term engagement. I gained insights into the

connection between the inner life and both the nature and quality of care by observing others, but I had little direct experience or interior knowledge of it.

Action

In reviewing this period from my current vantage point to identify what lessons I would enact in the future, I can see that many of the core principles that guide my work to this day had their antecedents in experiences from India. Though I didn't know it at the time, I was piecing together some valuable lessons that would form the building blocks of my practice, my way of being in the world, and ultimately the organisational identity model I develop. First, I learned that the basis for any action is engaging with reality as it is and being grounded in relationship with people on the margins; second, that truly seeing the person in front of me is of fundamental importance (this was the beginning of my later appreciation of solidarity); and third, that lessons need to be experienced as embodied, felt, 'interior knowledge' if they are to be more than an intellectual exercise. India afforded me that experience, both in confronting my weakness and seeing how my own privilege blinds me to injustice. Other lessons that were merely glimpsed at this stage would play a significant role in later periods. They include acknowledgement of the importance of having quality staff; the requirement for robust process and oversight to ensure quality practice; the need to intervene at different levels to address injustice; and the importance of the interior life.

I can see now that these experiences and insights changed the direction of my life. They were raw and profound, while at the same time, paradoxically, they were 'thin', lacking sophistication and complexity. Nevertheless, it was the impact of the felt experience that laid the ground for further development over coming years. Beyond yielding specific insights that would find their way into models of practice years later, these experiences caused the scales to fall from my eyes rendering me open to see more in the future.

Evaluation

From this period of my life, I can discern a number of antecedents of the seven elements and Way of Proceeding framework that I currently use in my work. The emerging features of these elements are presented in Table 3.

Table 3. Elements, Act One

Gratitude	This had not yet emerged, apart from fleeting moments of awe.
Relationship	The main lesson from this time was the centrality of relationship as the basis for effective interventions.
Doing	I understood the importance of clarity of purpose; of awareness of the impacts of one's actions; of skilled interventions and staff; and of standards of care and oversight.
Influencing	I understood the reality of poverty and structural injustice and the need to work at different levels, including effecting structural change.
Discernment	I glimpsed its importance, but did not name it as such.
Magis	This was not developed at this stage, as I was caught up in responding to the need before me.
Contemplatives in action	This was not on my radar yet, but I had some insight into the importance of the interior life.

Act Two: *Hesed* Community, 1976–1991

> The challenge for me now is how to live as a Christian in my own country.
> (Edwards, 1991, p. 131)

Context

Illness had brought me back to Australia and I had to stay in Melbourne for treatment. I went back to university to complete my social work studies, but I was looking for something more. Back in Australia, I was challenged about how to live out my values and new-found Christianity in a context where poverty seemed less visible and where injustices were complex and interconnected.

India had been a profound experience. It had changed me. I didn't want to settle back into the life I had lived previously. So, in 1976, at twenty-one, in an attempt to find a way to live with integrity, meaning and purpose, I started a community with a couple of other young women I'd met briefly. But to say 'started a community' gives the wrong impression. The word 'community' wasn't in our lexicon. When we came together to share our lives with each other, we did commit to some basic principles – living simply, prayer, and offering hospitality to the most poor and disadvantaged people in our community – but we hadn't discussed what we meant by these. In fact, all three of us met for the first time only when we moved into a ramshackle house in a poor neighbourhood. We moved in together, we didn't know for how long, and tried to live out an expression of some vaguely articulated commitments. We soon discovered we didn't have a shared understanding. Without realising it, I had inadvertently taken the first steps towards living a radical community lifestyle – living in close quarters, and sharing bedrooms, meals, and resources, including with some of our community's most marginalised and damaged members.

There was a small community of Jesuits living nearby who role modelled accompaniment and intense engagement with people on the margins. Jesuits were not new to me – I was brought up in a Jesuit parish and my father, brother and male family members were educated in Jesuit schools. But the Jesuits I met in this community lived a very different lifestyle. We connected strongly with them. Six months later though, their household disbanded; ours lived on. By then, we had also formed relationships with other Jesuits from the local parish, and Jesuits in training. Some powerful, enduring relationships were formed during this period.

In our community life, we wove together various strands from these Jesuit connections, our previous individual lives, elements from the countercultural world we

were drawn to, and relics from religious life that we saw value in, like fasting and waking to pray in the night. It was an odd, vibrant mix.

> We're like a weird throwback religious order, doing things they abandoned long ago. We're like a hippy community – baking our own bread, spinning, weaving our clothes, making music together. (Edwards, 1991, p. 126)

I lived in the community until it folded sixteen years later. At its heart, there was always a committed core of people, which grew to include couples and families. From the very beginning, we welcomed others to make their home with us. It was the era of deinstitutionalisation when people who had lived for years in a range of institutions were being moved out to live in society, but without adequate support. Many of these found their way to us, along with people who were homeless, struggled with addictions, or were exiting custody. There was also a broader group of people who were an important part of our life – some living with us for periods of time, others visiting, working alongside us, praying with us, or sharing meals and conversations.

India had made a dramatic impact on me. The confronting nature of the experience, combined with my youth and inexperience, created a situation where particular one-off events had the capacity to assault me, teaching me some hard, sharp lessons. Life in community usually taught me in slower, deeper ways. During this sixteen-year period of my life, I went from being a naïve twenty-one-year-old to a thirty-seven-year-old woman, married with three children. My delight in them, and the other children born into the community, was a highlight of this period. The power and joy of these personal experiences shaped me profoundly, along with other events from those years. Together, they taught me rich lessons that would find their way into models of practice and organisational identity I would develop some decades later.

Scene One: Relationship

Context

India had been a great teacher. New lessons awaited me in community. We couldn't have had a more flimsy start. Three young women – all twenty-one, all students – who didn't know each other. Whatever was going to happen would depend, first of all, on how we got on.

Experience

It was a bit awkward when the three of us first moved in together. But the fact that we had no shared history or clear common purpose threw us back onto each other as a starting point for our new life. It propelled us into relationship.

> Three strangers, all so different in personality, backgrounds, friends; maybe that's what helped keep us together – we had nothing to hold us, unite us, so we really gave ourselves completely in our relationships with each other. (Diary, 1984)

At the heart of our life, from the very outset, was relationship – with each other and with those who came into our lives. Forming relationships wasn't a technique to achieve something else. It wasn't a by-product of something else. We were cultivating a way of being. We were being refined, changed, converted – our minds, our hearts, our sensibilities – to tune in to others, particularly people whose lives were far removed from our own. We learned that the more open, vulnerable and authentic we were, the deeper the relationship and the more we were changed. Radical availability lay at the heart of this way of being: 'One of the Jesuits prayed that we not be too organised and efficient to miss the beauty discovered in time "wasted" with people' (Diary, 1976). We were being transformed. A notebook entry from these days reflects this.

> It is a basic change of heart from which you do not *do*, but you *be*. So to be hospitable you do not *do* certain things – e.g., jump up and welcome people, make a cup of tea, etc., for you can go through the motions of *being* hospitable without having a hospitable heart. The doing parts still occur but they *flow from* a deep conversion of heart. It's a process that goes on *inside* you, that revolutionises your whole being from the inside, bit by bit. (Notebook, 1978)

This understanding of a hospitable heart lay at the centre of our understanding of the reciprocal nature of relationship. It became the basis of our solidarity.

> Presence to people is being with them, it's sharing my life, opening my heart, accepting people into the core of my life. It's a presence to people that does not see people as problems, not to work *on* them, change them, etc. This doesn't mean you leave a person where they are, but challenge and growth occur within the relationship and is a two-way thing. (Notebook, 1979)

This understanding about the centrality of relationship was being forged in daily life around the kitchen table and also in prayer. One day, reflecting on the parable of the Good Samaritan during an eight-day retreat, I had a powerful prayer experience that stayed with me for years: 'You've got to be *with* people. You are the response' (Diary, 1977). My understanding continued to evolve. Rather than simply valuing relationship, I came to see that our essence is relational: 'My very being is relational, i.e., we do not exist independently of one another – we need each other to be "alive". We are part of the one whole' (Notebook, 1983).

As our understanding of relationships grew, we came to see that they built on a deeper, more fundamental relationship – with God. This was reflected in the name we chose for the community – *Hesed*, a Hebrew word meaning the steadfast love of God. We chose it to signify our fundamental understanding that God was at the centre of our lives together, that God practised *hesed* towards us, and that we are called to practise *hesed* towards others.

Reflection

My time in India had alerted me to the importance of relationships as the basis for engagement. This time in community was when that knowledge was being etched in my heart, mind and body. I was learning about the preconditions of relationship – presence and radical availability. From that foundation, I started to learn about other people's lives – people whose lives were light years from mine. Yet they were Australians who lived a suburb or two from where I'd grown up. These relationships were changing me, too.

Scene Two: Essentials of Care

Context

Deinstitutionalisation was proceeding apace. Large facilities that housed people with mental illness and various disabilities were closed down. People who had lived behind locked doors for years were being tipped into the streets. Young people who had never known family life and had spent their teens in 'care' or custody were hungry for belonging but terrified of closeness. Hardened alcoholics who slept under bridges and people troubled by the voices in their head – all these made their way to our door. We were picking up system failures. I was studying social work and learning about the formal system of care. The gap between what people needed and what was on offer could

not have been bigger. Many of the people we lived with had missed out on basics. Many had years of treatment, much of which did not 'see' them or touch their needs. We weren't trying to be professionals. We were trying to befriend people.

Experience

I did a social work placement at a drug rehabilitation service. Once a week, 'outpatients' came in for a group work session. I was impressed with this intervention and imagined the good it was doing. Soon after, Lexi came to live with us – a beautiful young woman in her twenties who had already spent years doing the circuit of detoxification and rehabilitation facilities in an attempt to beat her severe alcohol addiction. Every day was a struggle for her – to catch a tram, to speak to people, to resist picking up a drink. We grew close. One day, inebriated, she reached up to touch my face. I felt it like a caress to my soul. Soon after, not long before she was found dead in a boarding house nearby, she mentioned in passing that she didn't think it was worth going to the group session scheduled for that afternoon. It struck me with great force that this was the same group that I thought was potentially life-changing. This paltry hour in Lexi's week could do little to turn around a life of neglect, abuse and trauma; what mattered was who was there when she woke up, who she shared a meal with, how she spent her days.

Anna, a young woman in her twenties, lived with us for a few years. She struggled with eating disorders; she self-harmed regularly; she'd survived a number of serious suicide attempts. She had been hospitalised dozens of times. Doing the most ordinary things – like having a conversation, looking someone in the eye, sharing a meal – terrified her. She was very intelligent and talented, with no sense of her gifts or attributes. Years later she told me how one evening over dinner I caught her eye and smiled. She'd felt relief wash over her; she felt welcomed, accepted just as she was. I had no recollection of this event. But it struck me then how the things we count as nothing, such as our general demeanour, can carry more weight than our more purposeful interventions.

Mia taught me a similar lesson. She came to live with us, after years of cycling in and out of psychiatric institutions. We spent hour upon hour listening to her, often long into the night. Early one morning, I think in my desperation to sleep, I asked her if she'd like me to sing to her. It was two o' clock. I sat on the end of her bed and sang. It soothed her to sleep. Years later, she told me that her abiding memory from the months she lived with us was that I sang her to sleep when she was troubled. I was stunned. I learned again

about the unexpected power of small, incidental gestures of kindness and the power of memory as a repository of grace.

Mark had spent his childhood living with a series of foster families before progressing to a youth justice centre and then graduating to prison. I had a soft spot for him. We all did. We first met him when he was fourteen. We gave him a party – his first – when he turned twenty-one. The chaplain he knew from custody came, and so did his youth worker. There were a couple of speeches and a few kind, fond, hopeful words were spoken. The party continued. Before long we noticed Mark had gone missing – out the back door and into the night. Later we realised he'd gone up the side path of our house, climbed in through the bedroom window, rifled through people's pockets searching for wallets, and fleeced us while we were in the room next door celebrating him. A few months later, when he was back in prison, he made contact with us. The relationship continued.

In my early thirties, I took a three-month course in chaplaincy training, based at a large psychiatric institution. I got an insight into what 'care' in First World institutions looks like. I saw how this is often geared to what professionals need to fulfil the requirements of their job, rather than meeting people where they are: 'Patients have told me they feel lost and confused here due to the rapid staff changeover; no one really knows *their* story' (Diary, 1989).

I sat in on an intake interview with a young man whom the police had charged and brought in to the hospital. He had called the police himself because he recognised that he was 'losing it'; he had a gun in the house and had threatened his wife. He looked broken, devastated. At no point in the interview did there seem any attempt to make a personal connection with him. None of the professionals in the intake panel asked how he was, about what had happened, or about how he was feeling about the events that led to the police bringing him to hospital. He was asked dozens of questions, from depression to other inventories that covered matters such as his appetite and his sleep patterns.

> I was horrified during parts of the intake interview. I felt the main concern was to get enough information to write a court report. Care for the man didn't seem paramount … I found it quite excruciating. (Diary, 1989)

After the interview, I followed him out of the room. I felt compelled to engage with him. It seemed inhuman to have witnessed his pain, guilt and fear and to blithely ignore it.

Tentatively, I asked him how he was. He looked at me, confounded. ‘What the f… was that?’

Reflection

For years we watched people emerge, blinking in the sunlight, from lives spent in institutions. I learned that these places are almost always bad, that they depersonalise, deskill, and make people sick. I learned, too, that services in the community are not enough to meet the needs of people who have long-term, complex problems.

I learned that as professionals, we often overvalue our limited interventions. Living every day alongside people who received such services, I saw that an hour-a-week intervention, or the group that we think is life changing, pales into insignificance compared with the importance of where you sleep, who is there when you wake up, who you eat with, and how you spend your days. I learnt that simple kindness counts for a lot – a smile, a song, sharing a cup of tea, preparing a meal together. I learned that people yearn for meaning and purpose and that it takes a long time to rebuild a life. I learned that people need other people, neighbours, and community, and that we want people to be in solidarity with us.

Alongside insights about the centrality of relationships and their power to transform lives, a lesson from that period of intense engagement with people on the margins was that violence is a daily reality. Whether sleeping rough, or in prison, in psychiatric facilities, in ‘special accommodation’, in boarding houses, or your own home, violence is a constant companion. It comes in the form of strangers, ‘mates’, police, prison officers, ‘carers’, landlords, partners. Death too is close at hand if you are poor and troubled – through violence, but also through suicide, accident, addiction. We buried many people over the years. At funerals we sometimes met families who filled in the picture of the person’s life; often we were the only ones present.

Scene Three: The Great Fire

Context

Not all my lessons came from the poor and oppressed. Some came from my reading and conversations – the political, social, environmental and spiritual literature we shared and discussed. Many came from the triumphs and calamities associated with aspiring to be good and to do good, and assuming that others want what you want. Lessons came from the experience of failure to love and, most heart-breaking of all, the dawning realisation

that sometimes love is not enough. When the community had been in operation for about eighteen months, we had a crisis.

Experience

> We were living with skid row, and skid row was dominating. We had ceased to offer anything different from what they could be living elsewhere. We lived with very difficult and often manipulating people and in our fervour to avoid a 'them/us' situation had attempted to make no distinctions where, in fact, distinctions existed. The problem was a lack of clarity, and ultimately a lack of truth. We were not all the same, and we were pretending we were. (Diary, 1984)

We took stock and decided to reset. We wanted our home to be a place of hope. We named the reality that it was our home; that we had made a commitment to live in community with each other; that we would invite people to live with us who wanted our support as they tried to get their lives back on track. We evicted a few people who didn't seem interested in that. It was a hurtful exercise, and we could probably have done it better. This experience showed us that you need to understand your purpose.

> That is why it's so important for the core people to be clear about our vision, because otherwise you enter people's lives with unreal promises and hurt them more than if you'd left them alone. (Diary, 1984)

I felt terrible. I felt bad about the people we evicted, but it was more than that. My belief in the power of love to transform everything was in shreds. We referred to this event as 'the great fire'. The choice of such a dramatic name gives a sense of how significant it was for us.

Reflection

A lesson from this time was the importance of being authentic in relationship, which includes being honest about people's problems and circumstances. My commitment to mutuality and my understanding of my own weaknesses had led me to blur distinctions between people who were in dire need and people like me, who were privileged and had a huge array of resources to fall back on. The distinction was uncomfortable at many levels. It still is. We had grown to understand, after all, that each of us is imperfect, broken in some way, in need of healing. This experience was not so much about evicting

a few difficult people. It was a time of clarifying and redefining our purpose. We acknowledged that we had a particular spirit and that we had to remain true to it. The roots of my later understanding of organisational identity are to be found here.

Scene Four: The Long Haul

Context

We had just been through the kind of experience that could have spelled the end of the community. But we were in it for the long haul so we needed to find ways to make it work.

Experience

Soon after this event, we got to know a Jesuit who had recently come to live in our parish. Over the next four years, he accompanied and guided us on a regular basis.

> He helped us consolidate. I do not recall his actively directing us in any particular direction – he would listen to what we were saying, ask us to re-state our vision, help us to talk and, especially at the beginning, help us to listen. (Diary, 1984)

Without our fully realising it, Ignatian spirituality became embedded in our way of life. I made eight-day Ignatian retreats every year and a number of the processes we used, for prayer and for reflective conversation, were Ignatian:

> Listen to the *heart* of the person, listen to my own heart, talk to others, *discern* together (Diary, 1983).

Over this time, we had many conversations about ‘who we are’. We talked often about our spirit, vision, identity and purpose. We were becoming more thoughtful and intentional about what we were doing and why. We were moving from an ad hoc approach to our shared life, to one where we developed processes and routines that fostered our sense of shared purpose and identity.

A wise older friend who had lived for years in community and experienced the dissolution or implosion of two such ‘experiments’ offered me some advice at this time in relation to core members of the community.

> The most important thing is to know your *spirit*, to know your identity, who you are … know the three, four or five points which are essential to *your* particular vision, and that is what someone must be prepared to enter into – that or nothing. There should be no question of someone trying to change you or your basic points – someone can help deepen in what you're already living, but not alter the direction. (Diary, 1984)

Reflection

My understanding of the value of knowing 'who we are' as a community deepened at this time. I gained insight into the importance of being more intentional about fostering this identity and having processes and practices in place to support it. The 'great fire' had left me bruised. Being accompanied by a kind, wise Jesuit was a gift. He helped salve our wounds. But more, he showed us how to do this for ourselves and for each other. He encouraged us to develop a rhythm of listening, conversation and prayer.

Scene Five: Love and Freedom

Context

In the period following the 'great fire', we re-committed to our life together and to continuing to open our lives up to others. We learned that for this to be sustainable, we had to do more than simply have good intentions or strong will power. We started to recognise the building blocks for a shared life that would have the hallmarks of love and freedom. Time together as a community was key. So, too, was prayer.

Experience

Taking time out for prayer – personal and communal – became a critical foundation of our shared life. It was central to our growing practice of discernment. It opened me up to an interior knowledge that God is in everything, loving all things into being, sustaining all things in love.

> The wisdom is that *every*thing, every living thing, was laboured for by God, grows by God, is held in being by God – everything. God *loved* it all into being and now keeps loving it into being. (Retreat notes, Diary, 1982)

When I began on this path, it was with the intention to 'do good', to love and serve people, and I thought faith would sustain me in that. But over time, through experience and prayer, the focus shifted to discovering a growing intimacy with God. I was learning that God is the initiator, that everything is gift, and that receiving with gratitude is the healthy basis from which to give generously. Anything else is not life-giving: 'Only do as much, go as far, as you love – sure you need effort and discipline, but don't let it exceed the bounds of your love, or it'll be of no use anyhow' (Retreat notes, Diary, 1982). Communal prayer was also an important part of our life together.

> When we come together in prayer, we are stating who we are and to whom we belong. Communal prayer ritualises our life together. (Notebook, 1988)

Reflection

In India I had observed how the Sisters lived and how withdrawing from the hustle and bustle of daily life was a non-negotiable part of their routine. I was now learning first-hand the value of having a practice of prayer and reflection. Through this, I learned about the relationship between the inner life and action in the world, which fostered freedom to make life-giving choices. The importance of collective reflection and discernment was also brought home to me at this time. These understandings later translated into my efforts to embed reflective practices in organisational settings for all people, regardless of their faith, and to find ways to ritualise our shared purpose and identity.

Scene Six: Addressing Systemic Injustice

Context

Ignatian spirituality and the Jesuits were not the only influences shaping the community. Along with our growing experience forged from living in community and being in daily relationship with people on the margins, we read, discussed and debated issues of concern – social, political, environmental, theological, Church. We spent time with people and groups that challenged us to consider our role in confronting systemic injustice. We were wrestling with this against the broader backdrop of the Cold War, the threat of nuclear war and MAD (Mutually Assured Destruction), and growing concern for the environment.

Experience

Among community members, our critique of society was broadening. The interconnectedness of injustice was becoming clearer, including how our own lifestyles were linked to major social and environmental problems that were burdening people who had little visibility in the broader community. Some of our friends were living a radically alternative lifestyle based on gospel values. Other friends and colleagues around the world were being arrested and jailed for acts of civil disobedience. We were on the fringes of these actions. We wondered where we should be.

We searched for ways to express our growing sense of solidarity with the people we lived with and others on society's margins. We sought ways to address injustice in a manner that felt consistent with who we were. This sense of responsibility is reflected in this diary entry.

> After a few years of living together, especially with the poor, our experience of encountering the world and its economic, health and welfare systems through their eyes, and our reading and reflection, led us to believe that not only did we have the authority to speak on issues of justice, but due to locating ourselves in the heart of the poor, we had the responsibility to speak. (Diary, 1984)

One action we took was what we called 'fasting and praying for a change of heart' outside St Francis's church in Melbourne's central business district during Holy Week in the lead-up to Easter. We called others to join us in recognising how injustice manifested at the individual level through to acts of war and environmental destruction. We did this for a few consecutive years in the early eighties, camping in tents on the church grounds, keeping a vigil and talking with people entering the church or passing by. Being close to people in need had opened our eyes to the broader drivers of disadvantage and environmental destruction. Naively, we assumed others saw it this way too.

We were shocked to hear the views of the average citizen, let alone Catholic – racist, sexist, capitalist. This experience helped propel us towards a lifestyle where we could take greater responsibility for our lives and their impact on our world. We moved to the country, about 100 kilometres from Melbourne. We were two families with babies and small children, plus a few single people. We moved into a couple of deserted dwellings on a farm – no running water, no heating, no bathroom, no toilet. We had to start from scratch. We spent the next five to six years trying to create a life that reflected

our growing understanding of the interconnected nature of all things and the call to address injustice in its many forms.

> Slowly we begin to take responsibility for basic areas of our life – responsibility for the products in our homes, the food we eat, our recreation and the work we do; responsibility for our wounded sister and brother, our individual and communal spiritual life, our call to be peace-makers; for being a people, community, church. (Edwards, 1991, p. 79)

Reflection

During this time, I came to see the need for integrity and coherence across all areas of life. Engagement with people on the margins had been the central impulse to live in community. But being in solidarity with people helped me see the significance of other components, such as our lifestyle, the environment, prayer and advocacy. As I reflect on this time and the growing understanding of the connections between how we live and how this affects others, the environment, and our world, I can detect the roots of my commitment to strive for integrity across all areas of life evident in the organisational model I develop.

Final Reflection for Act Two

India was my great teacher. Significant experiences there opened my eyes and brought me into the real world. Each one was like a date during a courtship: high impact, stimulating, exciting. But community was the long-term relationship, the marriage. It was in community that the importance of belonging and connectedness were brought home to me. Learning how to enter into deep relationships, be in solidarity, share our lives and believe the best of people were the foundational lesson of community life.

Through experience, I came to know that relationship is built on presence and availability, and on small, sometimes incidental, acts of kindness as you share ordinary life. Discovering that it was a way of being, that it was reciprocal, that it was a gift to be received not earned, were treasures from this time that fostered the importance of gratitude. It was by being in solidarity with people that we learned what was really going on in people's lives, our community, and the wider world. This showed us the oneness of all life and the interconnected nature of injustice. It shone a light on the connection between our lifestyles and injustice – social and environmental. It pointed to the

inauthenticity of segmenting life into discrete components that were not reflective of reality.

This led to an understanding that an integrated, holistic response that touches all areas of life requires a wholehearted response. Being in solidarity meant going beyond caring for those who bore the brunt of current social and economic arrangements. This included finding ways to address structural injustice, social and environmental, and being free to respond. The importance of addressing root causes through how we lived and through advocacy was becoming clearer, though what methods should be employed were part of ongoing discussions and experiments yet to be further refined.

In hindsight, I can see that we had backed ourselves into a corner. *Hesed's* identity was characterised by a set of elements to which, for whatever reason, we were not able to give new expression in a way that was meaningful to us. Only now can I see that the lesson I learned then, and have intuitively applied, is that at times it's necessary to update elements that are essential to your collective or organisational identity, but this needs to be done in a way that maintains a sense of continuity.

My spiritual life deepened at this time and I learned the fundamental value of having a regular practice of reflection, personal and communal. Part of the rhythm of each day was to step aside from the busyness of life. This practice helped me appreciate my place in the world and my own purpose.

I learned about the importance of a collective identity and shared purpose, and how thesehold and guide all our actions. I saw the importance of this for us, but I also learned first-hand the damage it can cause others when this clarity is lacking. I learned that each aspect of your life is related to others and the importance of having integrity across these various dimensions.

Our life in community was rich, intense and deeply transformative. It was also often extremely difficult. Sometimes the challenges came from relationships with other community members, sometimes from relationships with the people we brought into our home, and sometimes from the harshness and drudgery of our life. Paradoxically, the most exquisitely beautiful moments came from these same places. They left us deeply connected, but a bit bruised. These lessons were the antecedents for my understanding of organisational identity.

Action

In reflecting on my experience and reviewing this period from my current vantage point, I can see a number of features that influenced the direction of my future action. In this period, I developed a strong sense of the centrality of relationship in gaining access to the reality of life as it is, which would later lead me to ensure policy and advocacy are informed by grounded reality. I also gained an understanding of the importance of presence and availability to the cultivation of authentic relationships. This makes it possible to be in *solidarity with people* to preserve the integrity of the relationship, rather than servicing 'clients' to preserve the business goals of the institution. I took the lessons about the importance of a collective identity and the task of fostering integrity across all dimensions of life, from the intrapersonal through to the interpersonal, social and environmental. Cultivating the inner life and creating a rhythm to support this, enacted at the personal and team level, travelled with me into the next stage of my life.

Lessons from this period feed directly into the seven elements and the Way of Proceeding framework, which inform the model for organisational identity that I develop later. Entwined with these lessons are the intense experiences of family life, particularly of being a mother. This was not only the underpinning joy in my life, but also the source of my growing understanding of the power of family ties and indefatigable love. This, too, would influence my understanding of good practice, leadership and fostering a life-affirming collective identity. My experience in the *Hesed* community was profoundly formative and would later influence how I understood the purpose and practice of Jesuit Social Services. But at this stage, I wasn't sure how they would translate into professional life.

Evaluation

I turn now to tracing the development, in the period covered by Act Two, of the elements and Way of Proceeding framework that I currently use in my work.

Table 4. Elements, Act Two

Gratitude	Gratitude emerged as a foundational orientation, fostered by regular practice of reflection on experience.
Relationship	My understanding of the centrality of relationships deepened, and I identified presence and availability as building blocks for forming authentic relationships.
Doing	I saw that 'doing' flows from first being with people.

Influencing	Grounded experience showed importance of promoting justice at different levels. Influencing is a necessary component of addressing injustice in the world, but it is not yet clear to me what form this should take.
Discernment	I began to practise reflection regularly and developed an appreciation of communal reflection and discernment.
Magis	I examined motives, commitments and how better to live individual and collective values in community, fostered through prayer and reflection. At this stage, I did not have a strategic focus.
Contemplatives in action	I saw the relationship between experience, reflection and action. It was becoming a way of being in the world.

Act Three: Transitioning to Professional Life, 1990–2001

Context

This period, between living in the *Hesed* community and beginning work at Jesuit Social Services, covers about ten years of my life. During this time, I worked in two community service organisations, first in a rural setting, and then in Melbourne.

In *Hesed* I engaged with some of society's most disadvantaged and troubled people. I saw the therapeutic benefit of our living alongside them. In the final years of community life, I came to see that many of the people who lived with us might also benefit from addressing their problems in a focused, intentional way, with the assistance of a skilled, compassionate professional. I became increasingly aware of the absence, or poor quality, of such services for disadvantaged people. I was interested to discover what skilled professional help might add to what we were offering. With the demise of the community, it seemed that a key way to continue my engagement with people on the margins was through a professional relationship. I wanted to strengthen my skills in this area. I returned to study – first family therapy, then a Masters in Social Work.

The community had folded, people had dispersed, but key relationships were maintained. Those bonds, forged in the fire of community life, continued to deepen over this period and beyond. I stayed in the country with my family and took my first 'real', ongoing professional job establishing a small family services agency in the local town, as a division of a large child-and-family agency based in a regional city nearby. As part of this role, I counselled children, young people, adults, couples and families. After five years, we moved back to Melbourne and I took on the role of director of a small agency, working with people experiencing bereavement associated with sudden, untimely or traumatic death.

Act Three bridges my pre- and post- Jesuit Social Services years and marks my transition into professional life. This was a time of learning about organisations, about strong work teams and about adapting and applying lessons acquired in informal settings into the professional realm. Returning to formal study was stimulating, helping me to bring conceptual frameworks and newly acquired skills into dialogue with my practical experience.

Experience

Working in a small country town as a social worker and family therapist showed me another side to idyllic rural life. At times I felt the weight of it. 'Sometimes the very soul

of this town lies on my heart and beats me down; lies on my back like a splintered cross, heavy with pain and studded with loss.' (Diary, 4-12-93). I saw that there was an underbelly to people and to the town that silently shaped the dimensions of a life, a family, a community. I was coming to see the complexity of ordinary lives. I counselled people and families who, in the main, were part of mainstream society. Their problems, brokenness and pain mostly went undetected. I was surprised by the many forms of violence I came across in families, all sorts of families, and that most people are private and ashamed, and want to keep this to themselves. I saw, too, the damage caused by various degrees of neglect and self-absorption, often arising from the adult's unaddressed needs and consequent inability to be attentive and steadfast in caring for another. I saw how this impacted most on children, shaping them, forming them into the parents they would be before too long.

Towns are so different – though they may be but a few kilometres away from each other, they are like foreign countries. It wasn't always clear to me what particular features led to strong, cohesive communities and, alternatively, to destructive, mean-spirited collectives of people. But working across different rural locations, I saw these variations. I glimpsed the structural nature of injustice and the formal and informal networks that hold and support people in ways that can mitigate its worst effects. I noted the discrepancy in how resources are distributed, and how local community networks, professional and otherwise, can make a town strong. But these factors didn't always seem to account for the differences that played out and affected people's fortunes. Sometimes I got a glimpse of a network of unseen relationships, or sensed an untold history, that guided the fortunes of the town. I was never sure. But the differences were real, and people lived different lives as a consequence.

After five years, I moved back to Melbourne with my family. I took up a role leading a small organisation that was part of a large, iconic health service. I was interested to see what it would be like to work in a setting backed by a powerful institution. The organisation provided counselling and group work to people suffering sudden, untimely or traumatic bereavement, and delivered training to professionals working in this field. The needs of people grieving in this way were great and there were minimal services available to support them. Our organisation was small and nimble. I was able to 'hand pick' staff who had exceptional qualities. We became a dedicated and creative team, designing and delivering new interventions and training for professionals. In this role, I dug into what good professional practice looks like and what is involved in

supporting it. I saw that the team's culture held us all and drove the practice. We shared a common purpose and a common understanding of how we wanted to work. Leading this team was like creating a work of art, working with each person's strengths and weaknesses, including my own, to shape it into something more than the sum of its parts. Trust and respect were the foundations. These were built slowly but became rock solid.

Everyone I counselled had a tragic story. Each loss was unique. I was confronted by the intensity and depth of feelings being expressed. I was challenged to examine my own beliefs when it came to the big questions of life. People want to have real conversations about what's weighing on their hearts and minds. It's important to know what you believe yourself and to be comfortable with your unknowing. You do not get to hide behind the role of professional.

I saw how bereavement provides a therapeutic window of opportunity to look at earlier losses that the current grief builds on. A young man was brought to see me because his partner had died of an overdose while he was incarcerated. He was serving a sentence in a youth justice facility but was allowed to access counselling in the community. A number of professionals were working with him, some who had been involved over years, providing a range of services including drug counselling, housing, and support to comply with community justice orders. As we explored his grief, it became obvious that his bereavement sat on top of a life teeming with trauma and loss. He had been in state care since he was a toddler – and that translated to separation from his immediate and extended family and many placements with various foster families, including a number where he'd experienced abuse. He'd had dozens of workers over the years and he'd connected well with a couple of them. Nevertheless, it seemed that no one had talked in any depth with him – about who he was, what mattered to him, how he understood his experiences, about the links between these and his drug use and violent behaviour, which had landed him in custody. His life was full of appointments with professionals and he felt grateful for the practical support, yet he felt no one 'saw' him. This made a big impact on me. None of these services was doing the wrong thing, but no one was doing the thing that was really needed – engaging deeply with him, staying with him in his raw pain, and accompanying him as he tried to make sense of it.

The job of program director at Jesuit Social Services was advertised. I now had more than ten years' leadership experience working in mainstream organisations – one a community-based organisation with no affiliation to the Church, the other a Church-based organisation. These experiences had raised a number of questions I was interested

in exploring: What is organisational identity, and how is it fostered? What are the features of good practice and how can they be promoted? How do you foster strong teams that support practitioners to do deep work? What is the role of leadership in these endeavours, and how might the interior life of the leader contribute to this? I thought the program director role at Jesuit Social Services provided the opportunity to explore some of these matters of interest to me, and to bring my professional life and my values more closely together. I applied for the job and was successful in my application.

One highly instructive lesson associated with this period occurred a couple of years after I left the bereavement agency. The leadership of the large health institution responsible for it decided to close the service. It was an ill-informed and short-sighted decision, compounded by the fact that it was executed very poorly. I was still close to staff working there and observed at close quarters this exercise of poor leadership and its impacts. It was one factor that would propel me to return to study again in the future. My area of interest was ethical leadership of human service organisations.

Final Reflection for Act Three

My time in *Hesed* had taught me how to enter into deep, authentic relationships with people on the margins. In this period, working with people from 'middle Australia' opened my eyes to different forms of suffering. I had assumed that mainstream structures and services served most people quite well. I was largely unaware of the complex lives and the pain many ordinary people contend with. I was quite ignorant about the level of violence and its various expressions that feature in so many people's lives. I didn't feel well equipped to respond effectively. My desire to make a difference took me back to study.

In moving into a professional role, I saw more clearly the value of strengthening family and community life to better hold people as they navigate the course of their lives. This was reinforced in my personal life, lived in the context of a young family in a small country town where I experienced the critically important role that strong social infrastructure plays. This fostered my sense of gratitude for the ordinary day-to-day bonds that sustain us all, and I saw the role community service organisations might play in fostering these and addressing structural injustice. For the first time, I saw their potential as instruments for social change.

I learned how the experience of loss and grief – such as bereavement early in life, abandonment, abuse and neglect – sit at the heart of much suffering, bad behaviour,

illness and disengagement. This experience coalesces with other factors and manifests in numerous ways including mental illness, substance abuse, struggles with parenting and family dysfunction. When bereavement occurs on top of this, the loss is compounded and often leads to complicated bereavement. I learned that even good services mostly do not address underlying trauma and loss, but skim across the surface of people's troubles and address only immediate needs.

Deep work is demanding. It taught me the benefits of having a strong team: to support each other to be faithful in this work and to reflect on what we were learning and what we needed to do differently. There is an art to cultivating a good team where people feel safe and supported and are confident in their purpose. It takes time and care. Embedding processes for discernment and reflective practice in our work routines played a key role in achieving this. I had learnt these lessons in *Hesed* and I translated and adapted them for use in a new context. In hindsight, I can see that this was my first experience of being a *contemplative in action* and seeking the *magis* in a professional setting.

In observing the closure of the bereavement service, I learned that large institutions close ranks and look after themselves; often they don't recognise the gems in their midst. I was taught an important lesson that I applied in future contexts: when you've got a treasure, nurture it. Once a good team or service has been disbanded, it's not easy to recreate it.

Action

This period offered a number of significant lessons that I would act upon in the future. I discovered that organisations can play a significant role facilitating social change, especially if staff are supported to attend to people's deepest desires. Working in the field of grief and loss taught me about the significance of both broken and enduring bonds, which helped orient me in the future to appreciate the web of relationships that hold us all. I also saw the value of study and training to improve conceptual and practical skills, which later translated into ensuring staff are properly qualified and experienced to do their work.

During this ten-year period, I had begun, unconsciously, to experiment with translating lessons from India and *Hesed* into vastly different environments with professionals from a range of disciplines. Up until this point, given the small size of the teams, I had been able to achieve this largely through the power of personal relationship.

I took lessons from Phase One with me into my next position, but a new challenge awaited me. This was the problem of how to develop systems and processes that would embed some of these practices across a sizeable organisation.

Evaluation

I turn now to tracing the development, in the period covered by Act Three, of the elements and Way of Proceeding framework that I currently use in my work.

Table 5. Elements, Act Three

Gratitude	The concept of gratitude developed through appreciation of 'ordinary' life, family and community.
Relationship	I came to understand the necessity of forming authentic, deep relationships in a professional context with people seeking help, and the importance of strong teams. I also grasped the centrality of ongoing bonds in people's lives.
Doing	While the provision of direct services is a priority, social justice organisations must also attend to developing new responses to address need.
Influencing	The capacity to create structural change appeared in the process of training other professionals and in advocacy on behalf of individuals.
Discernment	In this period, my practice of discernment deepened as I learned how to apply it in a professional context and in a team.
Magis	At this juncture, the capacity to 'do more' was oriented towards maximising minimal resources; designing new programs tailored for particular cohorts; and undertaking study to enhance capacity.
Contemplatives in action	Coherence of the staff team fosters a culture of being *contemplatives in action*.

Phase Two: Jesuit Social Services

Context

This Phase extends from 2001, when I was forty-five and took on the role of program director at Jesuit Social Services, to the present time (2020). My growing family, with all the associated joys and challenges, held prime place in my heart. The passion I felt for them sat easily alongside what I saw as my vocation. The role of program director presented an opportunity to bring together my experience, my social work practice and commitment to disadvantaged people, my interest in addressing structural injustice, and my personal values and beliefs. I knew the importance of relationship, of contemplation, of being skilled for the work, of having a strong team, of knowing 'who we are'. But I hadn't applied this in the context of a large organisation; nor had I linked it to Ignatian or Jesuit heritage, even though these had helped form me.

The organisation's origins date back to 1977 when, under the name Four Flats, it started working with young people connected with the criminal justice system. In 1995 it altered its governance structure, expanded its scope of activity and was renamed Jesuit Social Services. In many ways, it was a new organisation. This development occurred in a challenging and competitive environment associated with an earlier wave of neoliberalism that saw the community sector under siege and the closure or amalgamation of a number of agencies. A few agencies came under Jesuit Social Services, and, at the same time, the new organisation initiated new programs in response to needs that had been identified through the agency's work with young people in the criminal justice system. Experienced people held the key leadership positions. They had re-created the organisation: overnight a small agency of less than twenty (mainly unqualified) youth workers working with young people in the criminal justice system was transformed into an organisation of more than sixty staff from a wide range of professional backgrounds. The organisation's remit with young people expanded to include people experiencing mental illness and problems associated with substance abuse. Other work included mentoring vulnerable children, supporting refugees and migrants, running parenting programs and doing community development work in highly disadvantaged communities. The organisation also advocated on behalf of people in the criminal justice system and occasionally commissioned research.

Before long, some Jesuits expressed their concern that the organisation operated 'like any other mainstream welfare organisation', without any discernibly Ignatian or Jesuit approach to the work, and that staff were not aligned with the broader mission of

the Jesuits. In essence, they were concerned that the organisation did not have a Jesuit identity. This was not a new concern, even though the founder of the original Four Flats was a Jesuit and still heavily involved in the organisation. However, it seemed that the feeling of unease had become focused into active concern when the organisation became Jesuit in name.

In addition to the question about the organisation's Jesuit identity, the new provincial (province leader) at that time was worried about the 'high risk' nature of the work of the organisation. This was a period in the community sector of growing concern about risk management. The provincial had received legal advice that the Society of Jesus faced numerous risks operating the kind of programs run by Jesuit Social Services. Not long before I went to work at the organisation, he called for a review of Jesuit Social Services to assess both its Jesuit identity and its risk to the Society of Jesus. The review permitted Jesuit Social Services to keep operating using the name 'Jesuit', but the organisation was on notice on both counts.

It was in this Phase of my work life, drawing on earlier life experiences, that I would develop a clear understanding of Jesuit identity in relation to a community service organisation. I would also experiment with and refine models of fostering this identity in an organisational setting.

Act Four: Arriving at Jesuit Social Services, 2001–2004

Context

Act Four covers a period of three years when I was program director at Jesuit Social Services from 2001 to 2004. When I started, there were about eighty staff and a handful of volunteers. There was a Jesuit CEO (who had founded the original organisation in 1977), another Jesuit working as a counsellor in one of the programs, and a Jesuit chaplain. There were a few Jesuits on the board. There were three nuns involved in the organisation: one on the board, one on staff and one volunteer. The rest were laypeople, the vast majority of whom had strong social justice values but no connection, formal or informal, with the Catholic Church. Many were hostile towards religion.

Scene One: Woundedness and Chaos

Context

I'd accepted the job, agreed to terms and conditions, and turned up on day one, only to be told that I would need to work for a lower salary than what had been agreed. I was stunned. I said that wasn't acceptable and if this matter were not sorted out within a week, I wouldn't stay. I had already heard stories that others had been treated in this way. I felt I should take a stand against this type of behaviour from the outset. The matter was resolved. I received the salary I had agreed to. But it gave me a glimpse of things to come.

Experience

Jesuit Social Services had particular strengths. Staff were committed and capable, and the organisation was recognised for its work at the hard end of social justice and for its advocacy for people in the criminal justice system. But I soon became aware of a number of shortcomings. In addition to the organisation's ambivalent relationship with the Society of Jesus, there were internal issues that needed to be addressed. There was a negative culture in parts of the organisation, linked to the dissonance between the organisation's stated values and the behaviour of some who espoused them. A recurring theme in my diary over the first eight weeks was 'woundedness and chaos': 'Met with Central Office leadership and staff, and program managers. Issues emerging: WOUNDEDNESS. CHAOS' (Diary, May 2001). These were not always the direct result of bad behaviour, but rather of an absence of agreed processes.

> *Senior Management Group meeting* – chaotic. There are no clear processes, e.g., no agenda or minutes – no record of who's responsible for which items, dates for action, what decisions have been made. (Diary, May 2001)

Other times, it was the unintended by-product of a lack of clarity, or absence of transparent, accountable systems.

> It's unclear who to go to about basic administrative/office management functions. There's chaos re: process of appointment of staff, salaries, record keeping, etc. Need support for business systems, e.g., IT, OH&S, Human Resources. Information Technology – it's a mess. (Diary, June 2001)

I spent the next few months listening to people, building relationships and observing how things operated. It soon became apparent there were higher order gaps too. Many staff were proud of the particular program they worked in, but there was little sense of identification with the larger organisation and its mission. There was no overarching, coherent narrative that everyone connected with, nor was there a shared approach to practice. Programs operated as discrete entities, isolated from one another. Five months into the job, I wrote: 'We are not a business – but we can be business-like. We have a mission. Need to refocus philosophically.' (Diary, 10-9-01). I knew that central to achieving this change was tapping into each person's deep longings and sense of purpose. But I wasn't sure how to go about that.

> How to honour people's own spiritual life and values? To make spirituality accessible/real? For me, work is more than a job – it's a vocation and I like life/work/home to have an integrity that is whole/consistent. I think that's what so many of us want – to feel inspired, to feel purpose in what we do. The question is how to tap into that in a way that's helpful/respectful. (Diary, 5-11-01)

Staff spoke freely to me about various concerns. A number of people told me that it did not feel a safe environment to work in because of the lack of consistent, respectful behaviour in some parts of the organisation. This seemed to go to the heart of why so many staff I spoke to felt disenfranchised. They were particularly scathing about the dissonance they perceived between the organisation's religious affiliations and the bad behaviour of some who professed religious allegiance. I could see it was essential to

address this behaviour in order to shift the negative culture that I encountered in some parts of the organisation and to ensure that staff felt safe.

Reflection

The transition to Jesuit Social Services was an intense and demanding time. I drew on previous experience to help me identify what needed to be done and attempted to translate earlier lessons from different contexts into a larger organisational environment. My time in *Hesed* and other settings had shown me the importance of having coherence between your espoused values and your actions, and that fostering the interior life can assist in creating this integrity. An early lesson from India resurfaced: the importance of speaking up and challenging bad behaviour wherever you see it, whatever your role; so before long, this became my practice. But it caused me a lot of pain over the next few years.

I also noticed how other areas of organisational life affect how people feel about their work – namely, the infrastructure, systems and practices that, in optimal situations, support the purpose and activity of the organisation. This was a new insight. I hadn't understood the demoralising effect that poor business processes could have on culture.

While I didn't use the language of organisational identity, I recognised the need for the establishment of a unifying organisational purpose and a shared approach to the work with which that staff could align themselves. However, I knew little progress would be made in that domain if the widespread woundedness and chaos were not addressed.

Scene Two: Practice First

Context

I soon realised that shifting troubling behaviour was not going to happen overnight. As program director, my core focus was to oversee service delivery, identify gaps and develop innovative responses to address unmet need. I turned my attention there.

Experience

I am first and foremost a practitioner, so I relished the core aspects of my role. I spent most of the time in my first months at the various program sites, talking with managers and staff across programs, meeting program participants, observing how things were done.

Within the first year, the organisation secured a significant philanthropic grant to design and implement a new program to assist excluded young people to move onto a pathway towards social and economic inclusion. Suddenly, and early on in my role at Jesuit Social Services, I had to articulate what the organisation was aiming to achieve in its work, and how we were to do it. This was both intellectually stimulating and personally challenging. 'I want to remember who I am … I want to remember what matters … I want to remember who/what the work is for' (Diary, 29-10-01).

Some program streams had copious documents with densely written material; other areas had nothing. Some staff distrusted the 'professionals' in the organisation; others looked down on the youth work approach of 'hanging out with kids'. Some staff thought that aiming to get young people into training and a job was setting them up for failure; others thought that the staff who focused on relationship were selling young people short. The process of articulating the goals of the new program brought these tensions to the fore. It became clear that while staff worked from a strong values base within their programs, this wasn't articulated beyond generalisations such as 'respect', 'access' and 'equity'.

Various interventions were being offered across the range of programs, but I was keen to ensure that these were guided by shared fundamentals, which, in turn, had solid foundations that resonated with our values and beliefs. Without this overarching framework, staff worked only in line with their personal experience and individual training background. There were, in fact, unexpressed principles in operation, but because they were not overt, the organisation was vulnerable to the latest people who arrived and wanted to influence colleagues to adopt their particular approach or therapeutic intervention. I'd seen how this had been used to redirect practice, sometimes in fundamental ways. Further, what was lacking was a shared organisational purpose that was explicitly connected to the practice.

I continued to consolidate my thinking about the need for an integrated practice framework. But I was vague about the details, mindful of bringing staff along with me, and alert to the problem of using religious language that people had no connection with or were hostile to.

Reflection

My primary responsibility was the service provision offered through the programs. In turning my attention there, I drew on previous years of experience that had shaped my

understanding about good practice. However, while I attempted to carve out a space in which I could make progress, I knew that treating practice as an isolated activity within the organisation was far from optimal. I understood this from earlier experience, particularly in *Hesed*, but also from listening to staff who spoke positively about their direct work but critically about the organisation overall due to their perception of inconsistency between what the organisation stood for and the behaviour they observed. This underlined for me the critical importance of coherence – between values and behaviour. I knew the importance of the inner life in fostering this alignment and the value of an overarching narrative to hold it together. I continued to struggle with its absence.

Scene Three: Finding a Way Forward

Context

Studying family therapy and completing a Masters in Social Work had fired my intellectual curiosity. I valued the discipline of reading, discussion and writing and I was stimulated by the exercise of applying this to my work. I decided to undertake a professional doctorate. This progressed in fits and starts during this period as I struggled to balance study with other life and work commitments. My thesis topic was ethical leadership in human service organisations. My original interest was to explore how the personal qualities, in particular the interior life, of the leader of an organisation might impact on the quality of the organisation and effectiveness of the programs. At this stage, I wasn't giving much consideration to the potential benefit of the application of my study to my work at Jesuit Social Services. After a few years, I discontinued my studies, but its importance lay in the fact that I began to theorise about relationship, including with self, in the context of organisational leadership.

Experience

Through my study, I read extensively about leadership. I noted the importance of having a clear vision, of having the structures, processes and the right people in place to operationalise this, of being able to take people with you, and, most significantly, of having congruence between what you say and what you do. 'It came to me that what I need is moral courage and moral stamina.' (Diary, 10-9-01).

Much of the leadership literature at that time had an overwhelming focus on personal traits and attributes that reflected the charismatic leader. This worried me, even

if those features were used for transformational purposes. One day at university, I expressed my belief that cultivating an interior life – in order to deepen insight and understanding of one's strengths, weaknesses, motivations and values – was reflected in behaviour and ultimately in the health of the organisation. I was shocked when a guest lecturer from the university's Business School responded to this by saying, 'Only in a negative way'. He elaborated, saying that a CEO needed to be unhindered by qualms or personal feelings when making critical strategic and business decisions on behalf of the organisation. My experience in India, in *Hesed*, and most recently at Jesuit Social Services, indicated otherwise. As I did the preliminary work in my studies to develop a model for ethical leadership in human services, I included a domain to reflect the importance of the interior life.

I was also learning that leaders' personal attributes, while essential, were not sufficient to guarantee effective leadership. Some leaders were kind and thoughtful, but did not make the connection between the organisation's values and the full range of its activity, including how resources are treated and finances are managed, through to ensuring quality practice and the safety of all involved in the organisation.

I was reading a number of texts that seemed to assume that social workers, and Church officials, operated from a strong value base that assured their practice was good; but the emerging reality of abuse in institutions (welfare and Church) alerted me to the trap of assuming that because we believe we are in the business of doing good, strong policies, procedures and oversight are not warranted. This led me to build into the model I was developing a domain that covered a range of organisational processes aimed at ensuring high quality practice and robust oversight of our work.

As part of my doctoral studies, I examined the impact that neoliberal policies and practices were having on how human services were conceived, the changing nature of their purpose, and shifts in practice to align with the dominant paradigm. In particular, I was concerned about the move to prioritise risk management often at the cost of responding to people's needs. I revisited social work literature that confirmed that providing quality services and addressing structural injustice were central to social work's purpose. I named the leadership model I developed 'Integrity across domains'. I was using the word 'integrity' in two ways: adherence to moral principles; and unity or wholeness. I identified a number of domains, from the intrapersonal to advocacy, across and within which the leader needed to strive for integrity in order to exercise ethical leadership.

Reflection

Returning to study proved to be more significant than I realised at the time. I was stimulated to engage in a process of reflection on experience, in the context of the material I was reading. This incorporated literature from social work, business, and spirituality. From these various inputs I drew on insights and lessons to outline a model for ethical leadership. I saw that the leader needed to practise and ensure integrity across a range of domains: the interior and personal, the internal structures and processes, the nature of the business, the quality of the work, engagement with stakeholders. While consolidating and synthesising experience, reflection and intellect was a satisfying exercise, I hardly glimpsed the further value this framework would yield when adapted, enhanced and applied in my future work.

Scene Four: Encountering the Broader Jesuit World

Context

In addition to study, experience gained as a member of the organisation's leadership team, and my personal and spiritual life, there were other influences, including from the broader Jesuit world, that I was getting to know at close quarters.

Experience

In early 2003 I attended a seven-day workshop in the Philippines on the topic of collaboration between Jesuits and laypeople who held leadership roles across the Jesuit Conference of Asia Pacific. The first thing that struck me was the strongly religious social milieu that many colleagues work within, standing in stark contrast to Australia. This was evident in how openly participants spoke about their religious faith, and also in the public domain where religious symbols were highly visible across the community. Early into the workshop, we were led in a reflective exercise about partnership.

> Consolations: I like working with an organisation where we share values – I'm 'home'. I like the greater effect our work can have due to the impact the Jesuits have. Desolations: I was feeling sad, then suddenly I started to really cry… the reality is it's been so hard and it's been exhausting. One thing that emerged in all this is my need for INDIFFERENCE, i.e., I do my bit, but I need to remain a bit detached from the outcome. It's not my business, its God's and I can only do my bit. (Diary, 29-11-03)

The promise of working in partnership was eclipsed by the challenging reality. This meeting initiated my thinking about the nature of partnership, and about who was responsible for the mission: 'Are we a Jesuit work? Are we *really*? What makes it so? What do we need to do about this?' (Diary, 29-11-03). I left the workshop with a clear understanding that Ignatian spirituality was fundamentally important, but with only a vague understanding of what this meant in practice, and no direction about what to do next. I was grappling with how Ignatian heritage could translate into the daily life and practice of Jesuit Social Services. No one was illuminating this subject for me. I could see that it was something I would have to wrestle with myself.

Reflection

My experience in the Philippines, immersed in a religious culture where there was open conversation about faith as part of everyday life and work, was a world away from life at Jesuit Social Services in Australia. I was wondering how these worlds could be bridged, or how the treasures from Ignatian spirituality could be brought into my very different context. I had glimpsed the importance and value of Jesuit heritage, and realised that if this were to be translated into our organisation it would be up to me to do it.

Final Reflection for Act Four

These early years at Jesuit Social Services as program director were very difficult. As I had anticipated, a key issue I grappled with was how to influence the culture and direction of a sizable organisation when it's not possible to have a personal relationship with all staff. This points to the importance of the right systems and processes to implement preferred directions.

As program director, my goal was to promote skilled, deep, relationship-based work and ensure the quality of our practice. To progress this agenda, I began an exercise that felt like corralling staff from disparate disciplines and approaches into an agreed arena. I made some headway but fell short of arriving at a shared and documented understanding of the purpose and approach to practice. I had tacit knowledge of Jesuit heritage and sensed its potential. But at that stage I could not articulate it in any meaningful way, let alone see a way to use it in my work setting. Nor did I see a way to apply insights about ethical leadership that I gained through my doctoral studies to my work context. I had been three years at Jesuit Social Services when the role of CEO became available. I applied for the job.

Action

In this period, I sought to clarify the purpose and approach to practice, which oriented me to focus in the future on clarifying the organisational purpose and how it is given expression across all activity. The study that I undertook expanded my thinking and allowed me to build conceptual frameworks that contributed to the Way of Proceeding framework I would develop in the following period. Although I knew that Jesuit Social Services was an organisation in the Jesuit tradition, I did not yet understand how I might apply the features from that heritage in a community service setting. My experience as program director provided a solid base for me to enact these lessons when I stepped up into the senior leadership role in the organisation.

Evaluation

I turn now to tracing the development, in the period covered by Act 4, of the elements and Way of Proceeding framework that I currently use in my work.

Table 6. Elements, Act Four

Gratitude	Lessons about gratitude were confined to my personal life, especially relating to my family.
Relationship	The centrality and authenticity of relationships was reinforced in my studies on ethical leadership and in my experience as program director, where I identified a need for healthy collegiate relationships, especially given the demanding nature of the work.
Doing	I identified the need to have a clear purpose for the 'doing', but was not yet clear about what this should be.
Influencing	I noted that advocacy should be informed by the grounded experience of staff engagement with people on the margins.
Discernment	Discernment was important at a personal level but not embedded in teams or the organisation as a whole. I discovered that the Jesuit label didn't necessarily mean that the organisation's identity was Jesuit.
Magis	I began to appreciate that *magis* involved looking for strategic impact, including the process of undertaking further education in order to apply the learning to the practice.
Contemplatives in action	This was not a strong organisational feature, though staff were encouraged to identify service gaps they encountered and I introduced the practice of reflection at the beginning of meetings. I came to understand that study, writing, reflection and practice inform and reinforce each other.

This was a very challenging period where I learnt, by their absence, the value of many components that would feature in the model I would later develop. The relationship between values, practice, behaviour, and organisational processes was brought home to me very strongly. The importance of the domains of the Way of Proceeding, still to be distilled, was confirmed.

Act Five: Arriving as CEO, 2004–2008

Context

Act Five covers 2004–2008, the initial phase of my appointment to CEO of Jesuit Social Services. In this period, my focus remained mainly internal to the organisation. I have chosen the end point of 2008 because, from my perspective, that year heralded a new era: in that year, General Congregation 35, a key international meeting of the Jesuits, took place, granting me opportunities for greater engagement with the broader Jesuit enterprise.

Following the resignation of the previous CEO, the board engaged an executive search company to assist in the recruitment of his replacement. The final interview panel comprised two board members, including the chair, and a Jesuit. I was appointed CEO in June 2004. I wasn't a Jesuit. I wasn't a man. I wasn't a priest or a nun. This was relatively new territory for the Jesuits in Australia at that time. I had three years' experience in the organisation as program director to draw on, particularly in relation to developing and trialling solutions to intractable and emerging problems that affect people on society's margins. Nevertheless, it was a big step for me to take on responsibility for all aspects of the organisation's activity: the big-picture thinking and direction of the organisation, its culture, relationship with board and committees, public profile, stakeholder management, fundraising and relationship with the broader Jesuit network.

A key insight I brought with me into the role was that in addition to the core task of ensuring the organisation continued to innovate to find solutions to problems that limited people's life chances, my main task was to provide the kind of leadership that ensured the organisation operated in accord with its underlying values, across all domains of its activity. During this period, I had my first lessons in how to lead an organisation that straddled the worlds of the mainstream community sector and the Jesuit world. This was terrain I had to navigate by trial and error. A key development of this time was my first articulation of a framework to foster coherence between the organisation's people, practice, and processes that support that activity. At this time, under new leadership in the Australian Jesuit Province, Jesuit organisations were being encouraged to work collaboratively across our various sectors. There were new opportunities to meet and connect across the Province, and the sense of isolation from the larger Jesuit body that many of us had felt began to dissipate. There was a sense of possibility.

Scene One: Starting with My Own Reality

Context

I was excited to take up the role of CEO. I had a strong belief in the value of the organisation's work and saw opportunities to strengthen and extend this. As program director, I had felt hamstrung in exploring many of these possibilities and in attending to the deeper change I believed was necessary for the health and future of Jesuit Social Services. Now, as CEO, I was keen to make a difference.

Experience

I entered the role of CEO with my eyes open, aware of both external and personal expectations. All my experience to this point had primed me to see the opportunities inherent in the role. A diary entry within the first week illustrates the big vision I held.

> So what are the opportunities?
>
> - at core, to promote a more just society, to influence people's hearts so change is welcomed, owned, sustained – so it's first and foremost a values job – battling for the hearts and minds of people – program participants, staff, wider community.
> - tangibly improve the circumstances and possibilities for disadvantaged people – children, young people, families, communities – so better services, services where there are gaps; 'clever, compassionate' services that think of people's futures.
> - staff – committed, happy staff.
> - Jesuits – through Jesuits more widespread change is possible. (Diary, 14-6-04)

The reality, however, was that before long I struggled. As I entered this stage of my life, my fifties, with its attendant challenges, more than ever before I seemed drawn to the interior life. Business meetings left me cold, but I knew I had to do them; I was touched by the beauty of life, the poignancy of particular moments, the pain of the world. Again and again, I found myself looking out the window at the sky, marvelling at the mystery of all creation … only to be brought back to a budget paper or a discussion about risk management frameworks. I wondered if becoming CEO was a big mistake: did I really want to do the tasks associated with the role? As my mind descended into a murky fog, I wondered if I had the capacity.

> I'm drawn to looking up at the sky, interested in spiritual things and the interior life, and not the 'externals' of image, performance, etc. I had some mini breakthroughs … until one that showed me to embrace this, don't divide it off, bring to the new job this new vague, slow, compassionate person – incorporate it into me and into the job. For whatever reason right now, I am CEO – so BE it with all of me, bring all of me to it and I'll do it in my particular way. (Diary 16-11-04)

This breakthrough reflected what I had understood earlier in my life, namely that God is in all things: 'There is *no* place where God is *not*' (Diary, 4-10-04).

It reminded me about the importance of integrating my inner and outer worlds. With this recognition, I found the freedom to allow my experience of mid-life, including menopause, to set me on a different foundation from which to do my role. A diary entry from that time reflects how it acted as an integrating force.

> My 'mid-life' journey is highlighting for me all the things that have mattered over my life, e.g., spiritual life, relationships, 'slowness', not having to perform/act/live up to image; home life/community life – simplicity re: making food, being home. (Diary, 22-11-04)

The spiritual domain was the underpinning dimension that I drew on to shape my approach to the key areas I was contending with as CEO: how to live out the senior leadership role; my relationships within the leadership team, with staff, with the board and with the Jesuits; the service delivery and advocacy framework I was developing; and strengthening the organisation's identity. Treating any of these areas as disconnected from the others was not realistic; dissociating any from my interior life was similarly problematic. I had first glimpsed the reality of this interconnectedness while in India, and my time in *Hesed* confirmed it. But life was teaching me that I needed to learn the same lesson repeatedly in different circumstances. I saw again that my life, including my work, was first and foremost a spiritual journey. There were the new responsibilities, the skills I had to develop, the key relationships I had to manage. But beyond those strategic and practical matters, I was encountering the deeper meaning of the role, of my purpose. Following a day's retreat at this time, I wrote:

> What struck me is 'the greater glory of God' – or to build a more just world or whatever – but the *higher* purpose; not *me*, God. I seek the grace of *indifference*. I seek freedom – to be, do what's needed, to be kind, to be compassionate, to be unpopular, to keep going. (Diary, 12-1-05)

It was becoming clearer to me that to do my role well I needed to foster particular habits and behaviours. Interior freedom was fundamental. Alongside this, I had a growing sense of the importance of small, simple acts of kindness, seemingly inconsequential gestures, as 'micro-practices' of love that we can each enact daily.

Reflection

I was discovering anew that God is in all things, all experiences – the most challenging along with the most uplifting. With this insight, I came to see that menopause was a gift, steering me down a path that would honour the spiritual and mysterious in life. I had often espoused my view that the only place to start from is yourself and your own reality, but was now deeply challenged to practise this in my own life. This experience fed my determination to include the human spirit and the practice of reflection in the model I later developed to foster organisational identity. As I write this reflection, I smile to think of that menopausal woman, awash with female hormones that were fuelling her mysterious inner life, walking among the Jesuit corridors of male power.

Scene Two: Building a New Team

Context

Since coming to work at Jesuit Social Services I had been concerned about the gap between the organisation's values and behaviour. As CEO I thought I would have the capacity to shift this. One of my first tasks was to form a new leadership team of committed peers to work with me to lead this change.

Experience

I sought to recruit senior people who had extensive experience in our sector, but who were also prepared to work with me to strengthen the Jesuit identity of the organisation. It soon became obvious that this was a stretch too far for a number of capable, experienced people. One candidate who worked at another faith-based organisation was surprised by the direction of the conversation. She commented, 'Oh, I thought you just

meant what we do where I work. You know, the mission statement and values are up on the wall, but we just get on with the work we're employed to do.' She withdrew her application at interview. No candidate had any experience of actively striving to bring together faith-based values and social work, let alone had knowledge of the Jesuit tradition. That didn't worry me. I just wanted people who were open to engage with the Jesuit story and go on the journey with me. In one interview with a very able candidate, I explored her willingness to do just that. She looked slightly bemused. 'I'll give it a go,' she said, and then leaned forward and with much more passion in her voice, she said, 'I'm gay. The Church walked away from me. I didn't walk away from the Church.' She got the job.

It was a big wakeup call to recognise that there was a small pool of people to draw from when trying to recruit suitably qualified and experienced senior staff who were also willing to embrace the approach and narrative I wanted to foster. I was struck by the enormity of the task that I had vaguely mapped out for myself: to get a whole organisation to operate in accord with its underlying purpose and values. I began to wonder: 'Who shines the light on OUR story?' (Diary, 6-12-04).

I talked with peers from other faith-based organisations who were contending with similar issues. The generation of leaders with a formal faith background was moving on, or had moved on, and there were fewer staff with any faith background, let alone allegiance to formal religion. So who would staff and lead these organisations to operate in line with their purpose? Concurrently, there was a strong push to operate in accord with the dominant neoliberal policy agenda and I was disturbed to see many organisations falling unquestioningly into line. This context was having a negative impact on the sector, which was littered with organisations struggling to recover from disastrous appointments at either end of the spectrum: CEOs with the right religious credentials but who were not capable of leading a team of staff with significantly more expertise and experience than they possessed; CEOs with MBAs or other qualifications and experience unrelated to the purpose and core business of their organisation. This experience reinforced the need to find ways to bridge the chasm between the professional social work and religious worlds, bringing the best of both together in a new way that was faithful to each tradition, respectful of both, and actually useful. Inherent in this challenge was an opportunity.

Reflection

The protracted experience of trying to appoint suitable leaders alerted me to the challenge I would face in embedding Jesuit heritage in the organisation and highlighted the challenge for faith-based organisations more broadly. I reflected on earlier lessons, particularly from my time in *Hesed*, where I had learnt the importance of knowing your identity and being true to it. This was to become my focus.

Scene Three: Leading Among Jesuits

Context

As CEO, part of my role was to promote the organisation and secure resources to enable us to live our mission. To some extent, this task sat uncomfortably with me. I perceived a dissonance between the attributes required for leading and the spiritual qualities I was committed to fostering.

Experience

One day, soon after sending an article to our supporters that outlined some of the organisation's achievements, a wise Jesuit I admired pulled me aside to tell me that talking about the organisation in this way was 'vulgar'. He told me it wasn't the Jesuit way. At one level, I understood what he meant and had been grappling with these very issues myself: our communications should point to those we were helping, not ourselves; yet there was increasing pressure on organisations like Jesuit Social Services to demonstrate effectiveness and to communicate with funders and supporters what we had achieved with the resources they made available to us. Also, I knew other Jesuits, in Australia and internationally, who enthusiastically promoted not only issues of public concern but also their institutions and works, highlighting the commitment to excellence demonstrated in these endeavours. I was confused: was it acceptable, even commendable, to promote the work; or was it crass?

This Jesuit friend also cautioned me against 'pushing Jesuit Social Services forward' in responding to need. He said we should wait to see if others would respond and, if so, let them take the lead. I had sympathy with his counsel, knowing it resonated with the Jesuit principle of responding when others won't or can't. But I knew from experience that other organisations were slow to respond to emerging needs, particularly unpopular ones. Also, it didn't fit with how Jesuit Social Services saw itself – namely, as a 'solution finder' for difficult problems, ready and willing to respond; nor with how I

interpreted the ‘Jesuit way’ of imagining what might be possible, designing solutions, and being ready and available to implement them; nor, frankly, with my natural disposition to respond creatively to need.

During this period, I was getting an insight into the potential of the Jesuit enterprise to promote justice at many levels; yet I was also facing the problem of how to exercise leadership in the Jesuit context. Gradually, prayer led me to a breakthrough in understanding: ‘What an organisation means cf a religious order are two different things and I’ve got to work within and between the two cultures’ (Diary 4-7-07). There is an art to negotiating these worlds and I’m not sure it’s possible without a deep understanding of the fundamentals of the Jesuit approach. There is no ‘Jesuit school’ for non-Jesuits. My experience is that Jesuits and their colleagues struggle with how to communicate their heritage to ‘outsiders’, let alone provide direction for how a broad range of people working in an organisation could apply the treasures from this tradition in a contemporary context. I was becoming increasingly interested in synthesising the worlds I was navigating.

As I engaged more deeply with the Ignatian and Jesuit story I gained my own insights and began interpreting the heritage in the light of my own experience. I had always thought it was ‘theirs’ (the Jesuits’), that they held the key to this treasure, and I genuinely appreciated the guidance they gave me at times. But it was clear that their narrative about Ignatius and Jesuit heritage was not accessible to staff like ours, and did not inspire or guide them about how to apply it in their work. I saw very clearly that in my context, if this work were to be done, I would have to do it.

Most Jesuits trusted me to take their precious treasure and apply it in my circumstances. Others continued to ask doubtfully, ‘How Ignatian and *Jesuit is* Jesuit Social Services?’ It was dawning on me that at the heart of this question was the issue of power regarding who gets to determine what is really Ignatian or Jesuit, and how this is monitored.

Reflection

Stepping up into the role of CEO brought to the fore my ambivalent relationship with leadership**.** I wrestled with this. I was growing into the role of CEO, while I was growing the organisation. I was trying to work this through in a context where the Jesuits I was encountering also displayed mixed views about leadership and also about the role that Jesuit Social Services should play and how it should operate. One point was crystal clear:

it was of utmost importance to the Jesuits that Jesuit organisations demonstrate their Jesuit identity. Yet there was little, or often confusing, guidance about what this meant in practice.

Scene Four: Finding the Deeper Purpose

Context

As part of my role, I continued to engage staff in conversations about how we should conduct ourselves and the features of good practice. But there was no clear model or framework that elucidated these ideas, and there was no regular process for sharing and discussing them. About a year after being appointed CEO, I had an experience of sharp clarity that led me to galvanise my efforts to articulate and foster a coherent purpose and approach to our work. The incident occurred in Paris in 2005 while I was attending an international meeting, 'Vulnerable Children, Vulnerable Families'.

Experience

I was listening to various presentations and I was struck by the fact that the problem of the neglect and abuse of children that we were each confronting in our specific circumstances was an international phenomenon. This was being played out in a variety of circumstances, from refugee camps to 'First World' homes where children were being abused, which pointed to a broader phenomenon of disregard for the most vulnerable in our communities across the world. Papers were presented on statistics, methodologies, characteristics of the cohorts and interventions, and outcomes (mostly bleak), and while I was impressed by the professionalism, I felt part of an 'industry' – the industry of caring for vulnerable children and families. An insight hit me with force: Jesuit Social Services should take a different approach. It wasn't that the presentations were referencing work that was not good; rather, it seemed there were already many people prepared to do that work and if that's all we wanted to do we might as well vacate the space and leave it to others. If we were going to do it, we needed to do it in our way. We should stand outside any industry or business of care; we should operate from a strong values base permeating everything we do; we should love people and stand in solidarity with them, respect each other, and work to build hope and capacity in people, families, communities and the wider society.

> I want us to be clear about what Jesuit Social Services is; for us to recruit the right people for that; for there to be reflection to foster that; for there to be supervision to ensure the practice is good – proactive, compassionate, skilled service that we document. (Diary, 5-10-05)

This experience prompted me to revisit and update the framework for ethical leadership that I had developed in my earlier doctoral studies. The original version had comprised a number of domains, from the inner life to the public role of the leader. In moving from an academic exercise to a practical tool with broad application, I simplified the framework and distilled three domains. First, the Human Spirit domain, which reflects that the person is the starting point for any action that follows. Second, the Practice Framework domain or core business of the organisation, which includes service delivery, community development and advocacy. This scope reflects social work's breadth of purpose, and it aligns with Jesuits' commitment to be grounded in relationship with people in need and also to influence unjust structures. Third, the Business Processes domain, which includes the infrastructure, financial, administrative and quality processes that support the organisation to do its work in a way that reflects its purpose. This framework had inherent value, but I recognised it could be enhanced if I drew on precepts from Jesuit heritage, adapting and bringing them to life in our context. Thus, at the heart of the framework, I placed a 'well', holding elements that I intuited from the heritage that could be applied to the three domains, giving them their distinctive Jesuit identity.

Originally, I had developed the framework with people in leadership in mind. I now extended it to include all staff, in acknowledgement of the critical role each person plays in building an ethically robust organisation. This resonated with my experience from India and beyond, and reflected a Jesuit understanding about the leadership role that each person plays. I further linked it to Jesuit heritage by renaming my updated framework our 'Way of Proceeding', a term familiar to Jesuits, which points to their understanding that what matters is how things are done not just what is done (Figure 5.2).

Based on experience in *Hesed* and the community sector, I knew the importance of having a coherent, overarching narrative that clearly communicates the organisation's purpose. This is reflected in a diary entry I made soon after being appointed CEO: 'I need to articulate the big picture view of where the organisation is going, its essential character' (Diary, 21-11-04). With the Way of Proceeding, I had the bones of a

framework that could support people to practise and behave in a manner consistent with our values. This was an important development. I then set about implementing it.

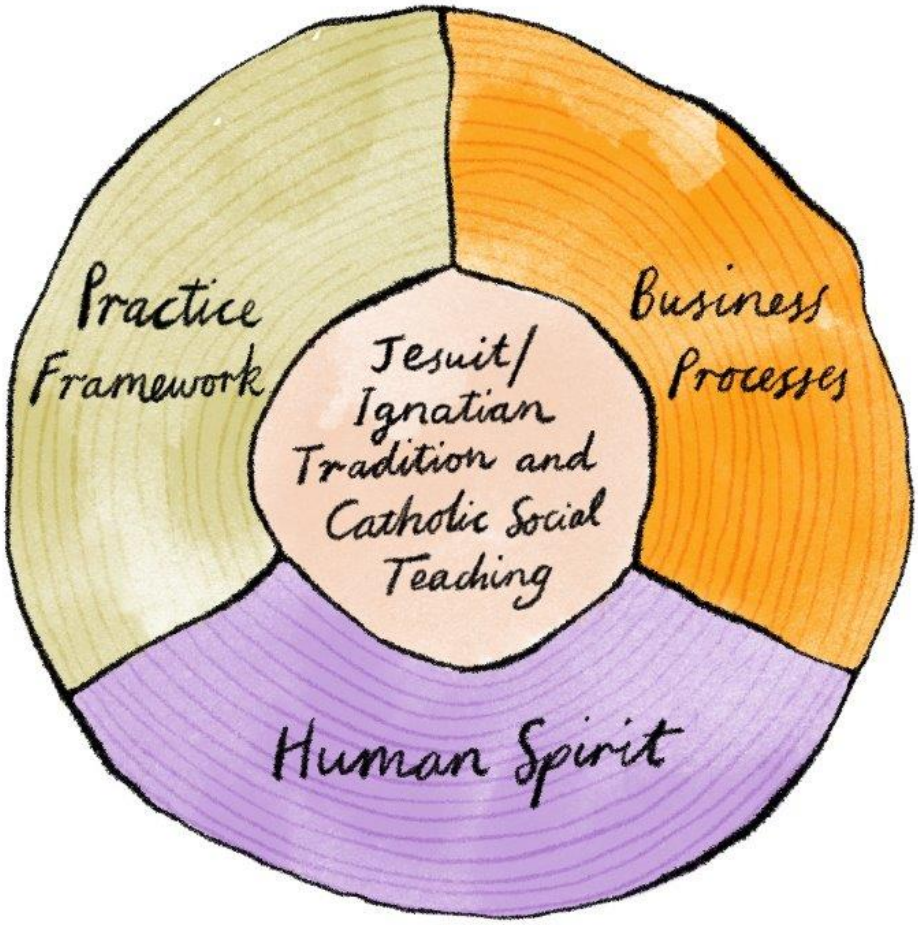


Figure 5.2 Our Way of Proceeding

Reflection

This period was a time of synthesising long-held and emerging knowledge and insights to create a way forward for the organisation. Without being fully aware of it at the time, I was embarking on a process of developing a model to foster organisational identity. I had developed the framework outside my work at Jesuit Social Services and, as such, had anticipated that it might be useful for people in a variety of settings. I saw, for example, the possibility of applying particular social work values or characteristics from a specific heritage to the framework and its domains, tailoring it as required to reflect the identity of those using it. Foundational lessons from my time in India, *Hesed* and professional practice also informed the developing model. But I was CEO of a Jesuit organisation and

my goal was to foster the Jesuit identity of that organisation; so naturally, it was to that heritage that I turned.

As I progressed, I found that the framework I had developed was essentially Ignatian. A model that starts with the self, that flows out to our relationships and how we engage with the world, and touches on all aspects of life has all the hallmarks of Ignatius and the Jesuits' *way of proceeding*. This term had been used by the Jesuits from their earliest days to refer to their approach as much as to what they did – their way of being in the world. I hadn't appreciated the distinctly Jesuit nature of my framework at the time; however, on reflection, it is not surprising given my years of formation (training and practice) in Ignatian spirituality and ethos.

Scene Five: 'You Mean Us?' Straddling Worlds

Context

My work to strengthen organisational identity soon highlighted that I was straddling worlds: the community sector and the Jesuit world. Fortunately, I had three years' experience as program director in the organisation that I could draw on to determine how best to proceed. My credibility as a social worker with an informed understanding of the pertinent issues and the practice stood me in good stead for the changes and developments I wanted to implement. This was critically important, given that our staff were overwhelmingly 'unchurched' and could be dismissive of people who attempted to promote Jesuit heritage if they lacked sector expertise and credibility. I was not an unknown within the Jesuit world, either. I knew many local Jesuits from my days in *Hesed*, most of whom had a similar spirit and concern for people on the margins. This gave me some credibility in that world.

Experience

My goal was to ground the organisation in its Jesuit heritage, to better live out its purpose and its particular approach of doing and influencing in the world. Much in the organisation was good and many staff were committed, passionate people, so my process was to start where they were and connect deeply with their impetus for social justice; to respect their vocational hearts, values and experience; and to shine a light on the connections between these and the organisation's founding story. I opened the space for them to see they belong here if they want, and that it could be a space they were proud of and that would support them to live out their vocations.

That was my goal. The reality was that at the outset, I was a lone voice calling people to this direction. I had to move gently with staff in implementing any changes, and I experienced pushback if I went too fast or too far. I remember on one occasion talking with a long-term staff member about the direction I was moving the organisation. She said she enjoyed working at Jesuit Social Services and liked the symbolism of having a few Jesuits in the organisation. Their presence pointed to another world, another reality. She used the word 'cute' in relation to them. In the middle of our conversation, she suddenly got the meaning of what I was intending. She was shocked. 'You mean *us*? All of us? We didn't sign up for that.' I noted her reaction and fine-tuned mine. Increasingly, I felt like an artist creating a piece of art, delicately drawing together threads from the organisation's heritage, social work and our lived experience to craft a 'Way of Proceeding' that could support and sustain the work, all the while bringing people along with me.

On the other hand, I was defender and protector of the staff and the organisation from some critical voices that came from some Jesuits outside the organisation. Many times I was asked 'How Jesuit *is* Jesuit Social Services?' I was engaged in what I called a double translation: first, translating the Ignatian and Jesuit heritage into a story with which staff could engage, and then translating the meaning of that story into our daily practice. I wanted staff engagement with Jesuit heritage to be meaningful and authentic, far beyond mere attendance at a 'formation' session. I wanted our identity to infuse what we did and how we did it, including how we treated each other, conducted our meetings, operated our programs, did our advocacy and dealt with our resources. I was not interested in an approach that showcased logos, branding and key phrases from the Jesuit lexicon unless these flowed out of a vibrant identity.

Our Jesuit chaplain dropped into my office every now and then to see how I was going. He encouraged me. From his perspective, the organisation reached out and connected with entire cohorts of people – staff, volunteers, program participants, supporters, government personnel – with whom local Jesuits otherwise had no interaction. He supported our invitational approach, our care to use inclusive language, our acceptance of people where they were, and our belief that they enriched the organisation and enhanced what we had to offer. He encouraged me.

In 2007 the organisation celebrated its thirtieth anniversary. In the lead-up to this milestone, I took the opportunity to work with the board, the leadership team and staff to ground the organisation more firmly in our heritage. We spent time revisiting our roots

and fleshing out our ‘Way of Proceeding’ framework, which we documented in a booklet for new staff. We focused particularly on the Practice Framework domain, engaging staff from every program to contribute to its articulation. We named this our ‘Way of Working’ (Jesuit Social Services, 2018), which drew from Jesuit heritage, the research and literature about ‘what works’, and the practice wisdom of staff. We chose ‘building a just society’ as our overarching vision, reflecting our status as a social change organisation, and confirmed our values of being ‘welcoming, discerning, courageous’. I came across a quote from Ignatius, where he said he wants his followers to live ‘always with one foot raised, ready to hasten from one place to another, in conformity with our vocation and our Institute’ (Ignatius of Loyola, 1548–1550/1903–1911, p. 581), indicating their availability, mobility and freedom to respond to need. I began to draw on this image as a symbol of our being grounded in relationship, while also being nimble and ready to respond as needed.

Reflection

Straddling the worlds of a mainstream community service organisation and the Jesuit world presented me with opportunities and also challenges. I was often lonely and I often doubted myself, but I felt I had no choice: I belonged to both worlds and valued them both. I sensed there was no future for Jesuit Social Services unless this work was done, so I searched for ways to bring these worlds together. But at this stage, I did not fully appreciate the rich potential of what I’d set out to do.

Final Reflection for Act Five

This period was a time of consolidating lessons from previous eras and consciously beginning the process of bringing them into contact with Jesuit heritage. But there was no map to guide me, and any direction coming from the Jesuit world did not translate well to our context, or was inconsistent and confusing. I saw that it was my job to create the path we were to walk on. From my current vantage point, it is clear that I moved slowly but purposefully to achieve this, learning as I went, making small inroads into the existing practice and culture, gently but firmly reorienting the organisation and increasingly grounding it in its Jesuit heritage.

Action

A number of lessons from this period would be put into action later. Nurturing the relationship between my inner and outer worlds would grant me the freedom to find contemporary, accessible and useful ways to foster organisational identity, drawing on Jesuit heritage. By enhancing the Way of Proceeding framework and bringing it into dialogue with Jesuit heritage, I was taking important first steps towards strengthening organisational identity, which would be built on in the following period (Act Six). My insistence on including the Human Spirit and Business Processes domains ensured that the framework would not be reduced solely to a blueprint to guide service delivery.

Evaluation

I turn now to tracing the development, in the period covered by Act 5, of the elements and Way of Proceeding framework that I currently use in my work. In this period, my understanding of gratitude and 'finding God in all things' was strengthened. I was further tuning into the concept of *magis.* This was reflected in my growing interest in identifying the more influential option in any situation in order to have greatest strategic impact and then being ready and available to implement this. The practice of discernment was important to me personally, gradually fostering freedom to lead in a way that rang true to me. I also began experimenting with ways to embed it in various ways across the organisation. At this stage there was a fledgling sense only that we were 'contemplatives in action'.

Table 7. Elements, Act Five

Gratitude	As my personal sense of gratitude grew, facilitated by my engagement with Ignatian spirituality, I also began to foster gratitude in the organisation.
Relationship	The foundational role of robust relationships was reinforced for me at this time, as was the importance of establishing strong collegial relationships in the leadership team.
Doing	Taking action remained a key focus, with greater consideration given to how it might reflect Jesuit heritage.
Influencing	The importance of the 'influencing' aspect of our work was reinforced and reflected in our new vision: building a just society.
Discernment	Discernment deepened at a personal level, but was not practised consistently across the organisation.

Magis	*Magis* was becoming a feature of how we operated and expressed a deeper commitment to address social problems and a drive to create strategic impact (or more influential action).
Contemplatives in action	Reflective practices, such as reflection at the beginning of meetings were introduced. I had sown the seeds for this re-orientation to understand ourselves as contemplatives in action, but it was not an explicit endeavour at this stage.

The Way of Proceeding framework had its first articulation in this period. This provided a basis for discussion with organisational members about our approach, but gaining full ownership of it across the organisation was a project for the next period. It was significant that this framework was not solely a practice framework, but built into the personal and organisational dimensions.

Act Six: Going Deeper, Going Broader, 2008–2020

Context

This Act covers 2008–2020. The year 2008 signalled a shift in my focus, largely driven by General Congregation 35 held early that year and the growing impact of neoliberalism on the community sector. Until then, most of my attention had been directed internally – strengthening practice, working with staff to find innovative solutions to some of society's most challenging problems, and bringing people together with a common purpose. As I entered this next phase, some foundations were in place to strengthen organisational identity. I built on these, taking greater account of the external environment. In relation to my research question, two major factors in the operating context were particularly significant.

First, developments in the Society of Jesus provided opportunities to build stronger connections with the broader Jesuit enterprise, where I saw the potential benefits of greater collaboration. General Congregation 35, in 2008, drew attention to the global context and, while acknowledging the diversity of circumstances in which Jesuits and colleagues live and work, stressed the importance of acting as 'a universal body with a universal mission' (Society of Jesus, 2008/2009e, p. 741, d. 2, n. 20). This understanding had been central to the Society from its establishment but was now given fresh emphasis, with a focus on collaboration and networking. Another key message from this Congregation was the call to be 'A Fire that Kindles Other Fires' (Society of Jesus, 2008/2009e, pp. 733–743, d. 2). Of particular significance, General Congregation 35 prioritised the mission of reconciliation – with God, neighbour, and creation (Society of Jesus, 2008/2009e, pp. 748–752, d. 3, n. 18–36), thereby elevating ecology to a central concern for the Jesuits. The Social Justice Secretariat was renamed the Social Justice and Ecology Secretariat to reflect this new priority. Following General Congregation 35, the role of the Conferences (local regions) was strengthened, and collaboration across Provinces, Conferences and the wider Society was strongly encouraged. These messages were reinforced in conversations and meetings with leaders in the Social Justice and Ecology Secretariat when they visited Australia in 2009.

This strong authorising environment for collaboration resulted in my attending key international and regional meetings, and spending time with Jesuits and colleagues across the world. Over these years, within our region of Asia Pacific, I spent time in the Philippines, Cambodia, Indonesia, Thailand, Malaysia, East Timor and China; and, outside the Asia Pacific region, in India, the United States, South Africa, Spain, the

United Kingdom, Ireland, Belgium, France and Italy. This provided opportunities for those of us in the social apostolate to learn about each other's situations and dream together about what greater impact we could have if we joined our efforts. I then applied lessons learned to Jesuit Social Services and was prompted to consider what contribution the organisation could make to this international effort. The pre-existing challenges the Jesuits faced, including their diminishing numbers and finding ways to ensure the Jesuit identity of institutions that were increasingly led and staffed by lay people, became more prominent during this era. In Scene One I explore the theme of the broader Jesuit enterprise.

Second, I observed that neoliberalism was increasingly impacting on the community sector – a trend the sector appeared blind to, or willingly compliant with. The absence of critique disturbed me. This theme is developed further in Scene Two. It was in this context that I worked to strengthen the organisation's Jesuit identity, pointing to the contribution my model might make to the Jesuits and the community sector. The reality of straddling the Jesuit and community sector worlds presented a number of challenges, which, in turn, points to potential barriers to implementation of the model I develop. I explore this in Scene Three.

Alongside these external factors, two personal factors were influential in this period: I deepened my engagement with Ignatian spirituality, through immersion experiences and through strengthening my regular practice of prayer. This period, from my mid-fifties, brought the highs, lows and typical events that characterise this life stage. It was a time marked by the death of close family members, the birth of babies and the joy of children, illness, relationship struggles and various significant experiences of my children. These, too, were part of the spiritual fabric of my life that I brought to prayer. My spirituality directly influenced my efforts to foster Jesuit identity and the model I present in Chapter 7. I explore this theme in Scene Four.

I also returned to study in the middle of this period. I had discontinued my Doctor of Social Work studies more than a decade earlier and, in 2015, commenced a PhD. This involved doing an extensive review of Ignatian and Jesuit heritage, organisational identity literature, and literature relevant to the current operating context. Concurrently, I have continued to lead Jesuit Social Services as CEO, while taking periods away from this role to progress my study. As such, in an iterative and reciprocal process, I have been drawing on my direct experience leading Jesuit Social Services to inform my study and

applying lessons and insights gained through my study to my practice within the organisation.

These four factors – greater engagement with the Jesuit enterprise, the operating context of neoliberalism, my spirituality, and my study – are significant, interconnected features of this period relevant to my research. They influenced how I understood my role and priorities, and how my thinking and practice about organisational identity evolved.

Scene One: The Broader Jesuit Enterprise

Context

Following General Congregation 35, I experienced the Jesuit world opening up. I had the opportunity to meet with Jesuits and colleagues in the social apostolate from around the world. Many had dedicated their lives to accompanying people on the margins and struggling for justice. They inspired me, expanded my horizons and fired my imagination. Spending time with them and people from other Jesuit sectors (such as education and spirituality) provided me with a vantage point from which to understand the potential of the Jesuit enterprise. In 2013 Jorge Bergoglio was elected Pope, taking the name Francis. He was the first Jesuit and the first person from the Global South to hold this position. His leadership provided an authorising environment for people pursuing the promotion of justice.

Experience

> The Jesuits are in a position to really impact on some of the big issues of our time – through their own members, their colleagues, and the people they reach. If that capacity could be further focused and strategic, much could be achieved. (CEO Report to the board of Jesuit Social Services, 2010)

Engagement with the broader Jesuit enterprise showed me the Society's reach – geographically, given their presence in dozens of countries – and across all levels of society from grass roots engagement to centres of power. Yet I was struck by its reluctance to initiate coordinated, strategic action; I was perplexed by the antipathy, at least in the social apostolate, towards developing institutional responses to address need and tackle injustice. I was, after all, dedicating my days to this endeavour.

Personal and institutional responses were often presented as standing in opposition to each other, but I did not accept this dichotomy. My experience was that organisations, alongside other responses including networks and social movements, can magnify individuals' efforts if they are at the service of a greater purpose. Organisations are best suited to tackle some forms of injustice and I valued how they support the efforts of individual persons whose hearts are inflamed to make a difference. My diary entry reflects this.

> In prayer I saw again that we put structures over our heart work, e.g., structures like Jesuit Social Services, the Church. But beneath these 'structures' people huddle to do their heart work. A 'structure' can provide protection (above), inspiration (from below) and companionship for the journey (from the sides). But the true ingredients of the 'structures' of organisations are the heart work, the little interactions. This is God's work. (Diary, 3-3-10)

The antipathy towards organisations, including at times towards Jesuit Social Services, did not go unnoticed by others. Shortly after I facilitated a small group of Jesuits engaged in the social ministries at an Australian Province gathering in 2019, one Jesuit emailed me:

> A note of thanks for chairing our delightfully fractious group at the meeting today … It did point to the challenge facing Jesuit Social Services, though, that so many of us Jesuits who are strongly committed to ministry at the margins are also instinctively suspicious of institutions, cowboys rather than ranchers. So, the best of luck in steering the boat in the tight passage between the shoals of control and anarchy. (26-4-19)

I encountered this response to organisations in the social sector outside Australia, too. I had expected to find many sizable organisations similar to Jesuit Social Services. Instead, I encountered relatively few significant, influential organisations. Far more common was the situation where individual Jesuits had developed small, personal initiatives to respond to social need in their local area, or small social centres where a few people were doing advocacy and policy work, many of which did not endure beyond their involvement.

Like a number of Jesuits and colleagues around the world, I have argued that developing robust organisations in the social apostolate is a priority if the Society is to

enact its social mission in an effective, sustainable way. Further, in my role leading one of the Jesuits' global advocacy networks, I saw first-hand that the effectiveness of networks is dependent on the existence of strong local organisations.

Reflection

The Jesuits face the challenge of how to progress their commitment to social and environmental justice in an effective, sustained way. In the context of their diminishing numbers and, in many parts of the world, there being fewer laypeople with any formal connection to the Church, I believe the way forward involves establishing robust community service organisations and fostering respectful collaboration with lay people. Ignatius and the first companions engaged directly with people in need and established institutional responses when that was perceived to be the optimal way to relieve suffering and promote justice. Further, they engaged laypeople, ensuring these endeavours were supported locally and would endure.

Scene Two: Our Operating Context – Neoliberalism

Context

During this period, our operating context was characterised by the increasing impact of neoliberalism and Jesuit Social Services' efforts to resist this. As a leader of a community service organisation, I was seeing first-hand how the community sector had somewhat inevitably absorbed the logic, values and practices of neoliberalism. In keeping with this shift, governments changed the way they engaged with community service organisations: seeking to minimise complexity in their relationships with the sector; prioritising arrangements whereby large 'intermediary' organisations hold the contract to deliver services across large regions – if necessary by sub-contracting to smaller agencies often embedded in local communities; favouring organisations that can readily scale up and deliver services that are 'packaged up', and are able to be readily quantified and costed.

The trend to a market-driven approach saw large national and international for-profit companies enter the field, keen to take advantage of the new business opportunities arising from the emerging agenda of various governments at state and federal levels. In parallel, smaller community service organisations merged, many entering 'forced marriages' with organisations with very different purposes and approaches to the work.

In the main, community service organisations fell in line with the dominant trend, mirroring their for-profit counterparts in the quest for business.

In 2012, Jesuit Social Services found itself at a crossroads. The impact of neoliberal policies resulted in a situation where we faced virtual obliteration: more than 90 per cent of our existing contracts were up for renewal and we were under pressure to form partnerships with entities with whom we had no previous relationship and who had very different values from ours.

Experience

Jesuit Social Services had been working with people in the criminal justice system since the organisation had started. A particular focus had been helping people make a successful transition from prison back into the community. Signalling a change in its role and how it would operate with other players, the government put out a tender calling for a consortium to build a prison, operate it and manage the transition of people exiting custody. In this instance, if the organisation were to continue its work with people moving back into the community after a period in prison, it meant forming a partnership with one of the three large for-profit multinational companies that had the scale and capacity to build and operate prisons.

We were wooed by one of these companies. I met with their operational leader. In the course of the conversation when I expressed doubts about proceeding, he said, 'I can't understand what the problem is. We've got the same values.' I was stunned. He rattled off his company's values – words like respect, care, integrity. On paper they did sound similar. I wrestled with this issue, together with the board and senior leadership team. Was the priority to stay engaged with those in need regardless of the contractual requirements? Or was it better to eschew such arrangements, given that they drew us away from our purpose on a number of counts – from divergent practice models through to our civil society obligations? We chose not to proceed, but others – including faith-based organisations – took a different path.

Evidence of the pervasiveness of neoliberal policies and practices in the community sector was everywhere. I often found myself in discussions dominated by markets – market share, competitive markets, saturated markets – or invited to conferences where sessions were permeated by business logic. Some of the topics covered at a recent sector conference and workshop (Third Sector, 2019) demonstrate the point: developing strategies to stand out in a saturated market; merging with like-minded

organisations to remain competitive in a saturated market; discovering new revenue opportunities that improve financial profitability; using machine learning and algorithms to make interactions more human.

The community sector was being squeezed into a shape that did not serve its larger social justice purpose. I saw the impact at a number of levels. Organisations shrunk their practice from offering holistic care to providing isolated elements of service delivery. They lost sight of their important role of harnessing community strengths, advocating with and for those in need and contributing to building a strong civil society. In essence, the sector appeared rudderless, disenfranchised from its founding purpose, and in the throes of an identity crisis. This environment propelled me to clarify and confirm 'who we are' and 'how we do things': our identity.

Reflection

The operating context influenced how I led the organisation at this time. The increasing impact of neoliberalism propelled me to draw on our heritage more than ever, bolstering our resistance to influences that sought to reduce people to actors in an economy. But more than that, it allowed me to bring forward treasures from the Jesuit tradition in a way that was contemporary, accessible and useful. My reading of the Jesuit story is that at its heart is a *way of proceeding* that provides a way to be in the world that is eminently suited to our era. I recognised its power to keep us fleet-footed while staying true to our deep purpose. I started to draw on it more heavily to support our efforts to operate from a strong values base.

Scene Three: Straddling Worlds – How Jesuit is Jesuit Social Services?

Context

The operating context in which I was endeavouring to strengthen Jesuit Social Services' identity presented particular challenges. The Jesuits were concerned to ensure the Jesuit identity of institutions that bore their name. Concurrently, there was a growing mistrust of formal religions. The Australian Royal Commission into Institutional Responses to Child Sexual Abuse (2013–2017) shone a light on the Catholic Church's scandalous history of abuse, mishandling of allegations and cover-ups by Church officials. All this was occurring against the backdrop of a strongly secular and ethnically diverse Australian society, with growing numbers of people interested in a variety of spiritual practices, such as yoga and meditation.

Experience

Strengthening the organisation's Jesuit identity was my priority. It was forefront in my mind in everything I did, including recruitment and induction of staff, developing new programs, advocacy, communicating with stakeholders, and establishing business processes. In strengthening organisational identity, my starting place was my reality. I know our staff well and am aware that they come from a range of different faith backgrounds, and none, with most not connected with the Catholic Church or any formal religion. This diversity reflects the nature of the participants and broader communities with whom we work. Staff express a strong connection with the philosophical, spiritual and value base of the organisation and appreciate being part of the Jesuit international network that shares their concerns. They are passionate advocates for social justice and are deeply committed to the people they accompany. They are respectful of Jesuit heritage, embrace it and make it their own. They recognise the link between our heritage and the commitment and approach we take to our work at the hard end of social justice. They are proud that we advocate with and for the people we accompany and that we tackle broader social justice issues. They appreciate our respect for the 'intangible' and the spirit in their lives, the lives of program participants and the organisation's life. They note how this helps us to resist getting caught up in a fad, or a rush for money or growth. Despite the crisis the Church is facing, they often comment that they deeply value working for Jesuit Social Services and regularly report that it gives meaning to their daily efforts. This is reflected in the Jesuit Social Services Staff Survey (Jesuit Social Services, 'Best Practice Australia', 2019) that is conducted every three years by an independent company. The 2019 survey found that more than 90 per cent of staff believed that the organisation has a distinct identity and that this identity is meaningful to their work. Eighty-five per cent agreed that this identity is aligned with the organisation's Ignatian and Jesuit roots. Staff resent, however, being treated in a way they consider disrespectful of their individual beliefs and values. This situation has been compounded by the crisis of sexual abuse in the Church and its mishandling by Church officials, leaving staff less prepared to accept what they perceive as superficial judgements of them, their values and beliefs.

In any context, but especially at this time, I see that my role as organisational leader is to nurture people's vocational hearts and to cultivate the organisation's Jesuit identity, ensuring everyone acts in accord with it regardless of culture, faith background or affiliation. My experience is that both the form and the manner of going about this

task are critically important in achieving the desired outcome. When I explore Jesuit heritage with staff, my aim is to translate it into a form that is contemporary, accessible and useful to them in their life and work and to facilitate their understanding and engagement with it so that each person, and the organisation as a whole, gives expression to our identity. The manner in which I do this is invitational, respectful of staff's beliefs and values, and encouraging of their personal commitments and practices.

Our strategy to recruit, induct and develop staff to work in line with our identity ensures that fostering organisational identity begins at recruitment. We open a conversation about values in recruitment interviews. We build on that in our induction process, particularly at the orientation session where I introduce the organisational narrative and engage in conversations about our identity. I invite staff to be part of this story and to help shape it into the future. I present, people respond, and I continue to refine my thinking. Topics include our Ignatian and Jesuit heritage; Catholic Social Teaching; the history of Jesuit Social Services and how the organisation fits in the wider Jesuit network and universal mission of the Society; and the vision, mission, values and purpose of the organisation and how they translate into our Way of Proceeding and its three interrelated domains. A parallel process exists for board members and volunteers.

Over the years, I initiated a number of projects, engaging people internal and external to the organisation, to develop documentation to support and extend this work – for example, the *Staff Orientation Handbook* (see Appendix A for Contents page) and *Our Foundations* (Jesuit Social Services, 2018). Beyond the induction process, staff are supported in their own development and in furthering the organisation's Jesuit identity in a number of ways. Reflective practices are embedded in organisational routine – including in team meetings, in training sessions, at All Staff Days. These occasions present opportunities to explore issues close to people's hearts, from a point of respect and awe for the personal journey of each person. In taking this approach, I'm not just enacting my role, but being true to who I am. Retreat notes from the time I made the Spiritual Exercised reflect this.

> This is my vocation, my life work … To engage people in this, to help them search, to lead them to a deeper place. And *how* I do that is open … I want to touch the hearts of people who have yearnings and no language for it, who wonder – and I want to do it by invitation. (Diary, 5-7-09)

A few local Jesuits continued to express their doubts about the authenticity of the organisation's Jesuit identity. Even today I am asked 'How Jesuit *is* Jesuit Social Services?' When I inquire about what lies behind this question, the response tends to be vague, but it always relates to the religious orientation of staff, or their relationship to the Church, or how we promote the spiritual dimension of our work, and what religious imagery is displayed. This question never relates to our practice. It never means 'How are you accompanying people on the margins? Have you developed new responses to emerging problems?' or 'Have you advocated strongly enough for those in need?' The question also never relates to our business processes. It never means 'How are you managing resources in an ecologically just way?' or 'Are your financial reserves invested ethically?' And in relation to the Human Spirit domain, it never means 'Are you honouring the person's values, story and spiritual journey?' Yet I know these things matter in the Jesuit tradition and to most Jesuits.

I became more confident in my approach as it bore fruit and as I recognised it more deeply as my personal vocation. Perhaps not surprisingly, it was a conversation with a Jesuit friend that helped crystallise this for me. A diary entry reflects this.

> This is my identity, and I've lived it deeply for 40+ years – searching, seeking depth while reaching out beyond my particular experience of depth, straddling, always straddling. *That* is my depth, my way to live, to be in relationship with God. I've chosen it because it's my truest identity, it's my source of life, it's shaped me, it's fed me – and it's cost me. I've been lonely. I've felt like I haven't fitted – in either of the worlds I've been straddling … I've felt apologetic for the 'straddling', awkward for it, a bit of a misfit. But I should claim it, it's my life, my vocation, my essence, my particular way of being in relationship with God; God's particular way of living in me, through me, with me – and to/for others. (Diary, 17-8-12)

This was an epiphany. It helped me clarify that my responsibility as CEO is to make explicit to all staff the essential foundation of Jesuit heritage and to ensure it is given expression across all aspects of our activity, giving the organisation its Jesuit identity. Further engagement with the Jesuit story, Christianity or Catholicism is not my core responsibility though I ensure there are opportunities available and encourage people's participation in these. Staff's spiritual journey beyond living and acting in accord with the organisation's Jesuit identity is their responsibility. My responsibility is to see our

identity manifest through our commitment to those on the margins, our availability to respond to their needs, and the particular approach we take to our work. It is expressed in how the organisation views and treats its people, ensures quality programs, manages resources and promotes every person's dignity and safety.

I came to realise that, according to these criteria, a number of Jesuit organisations may not have a strong Jesuit identity. A Jesuit from a well-known university shared his observations regarding our two organisations after spending time at Jesuit Social Services. He noted that reflective processes are embedded in our operations and daily routines. In his situation, by way of contrast, spiritual practices were confined to personal and community life, and a business approach automatically kicked in as soon as he entered the work environment. He acknowledged that the university's investments and other business practices should be reviewed in light of the order's stated commitments.

For some, the existence of Jesuits in key governance, leadership and staff roles seems to inspire confidence about an organisation's Jesuit identity. I asked the president of a renowned Jesuit university how he ensured the Jesuit identity of the organisation. He looked puzzled by my question: 'But I'm a Jesuit. And we have Jesuits on our board.' These experiences led me to conclude that organisations comprising mostly non-Christian laypeople people might not be the only ones to benefit from having an organisational model to foster Jesuit identity across all activity.

Outside Australia, Jesuits involved in the social apostolate working alongside people from different faith traditions sought our assistance. A Jesuit colleague wrote to me in 2019 to ask if staff from the Jesuit organisation he led could spend time with us to learn how to foster Jesuit identity.

> Would it be possible to send someone to spend time with Jesuit Social Services to learn about how Ignatian Spirituality is incorporated into daily working life? To my mind, Jesuit Social Services is really the model for how Ignatian spirituality can be (should be) an integral part of a social institution and inform its way of doing things. I know from my visit there that each Jesuit Social Services member would have, in some form or other, at least a corner of their heart engaged with Ignatius and his teachings. As for us, even now as we celebrate many years of operation, I find it difficult to point out what exactly makes us 'Jesuit'. As a group, we do not know St Ignatius, his values, and there is really no connection between him and our daily lives and activities. At the moment, there are only two Jesuits working here, and [we] have only begun in

> recent years to expose our lay members to Ignatian Spirituality. And in line with the Order's priorities for the coming years, we would like to take seriously how or in what ways can we begin to make Ignatian values a central part of our organisation's *way of proceeding*. It is actually quite exciting, but we need the help of our lay members. (Personal communication, 27-3-19)

Australian Jesuits' trust in Jesuit Social Services' way of expressing Jesuit identity increased over time. This occurred as a result of Jesuits spending time in the organisation and coming to know us. Strong relationships with individual Jesuits on our board and staff team have allowed them to act as 'interpreters' back to their communities; equally, by being available to spend time with staff in the day-to-day experiences of work life, there are opportunities for them to shed light on various aspects of Jesuit heritage in an informal and relaxed way. In this forum, Jesuits are often at their shining best, highlighting the central importance and reciprocity of relationships.

Reflection

In crafting the process to foster Jesuit identity, I drew on my experience engaging hearts and minds of people from a variety of cultural and faith backgrounds in a shared endeavour; my history as a practitioner with grounded knowledge about what constitutes good practice; my understanding of Ignatian spirituality and the Jesuit justice tradition; trial-and-error examples of applying this to our work; dialogue with and ideas from our staff about what works in fostering the organisation's Jesuit identity.

Increasingly, others across the Jesuit enterprise beyond the social apostolate are grappling with these issues. In the face of this I am encouraged by recent comments about secularism from the superior general of the Jesuits, Fr Sosa. He asked Jesuits to refocus their attention from regrets about an era that has passed to consider what God might be saying through the current reality and what opportunities this might present. My reading of Jesuit heritage is that it lends itself to fresh interpretation in each era, and I believe that Ignatian spirituality is well suited to the current circumstances characterised by secularism, diverse spiritualities and disengagement from formal religions. It is invitational, starting where the person is; it acknowledges that God is already present and active in all things; it provides practical methods for understanding one's purpose and identifying one's attachments; and it encourages contemplation connected with action, bringing the inner and outer worlds together.

In addition to highlighting the need to open up discussion about what is Jesuit identity in particular settings in a contemporary context, there is an urgent need to further clarify the nature of partnership between Jesuits and laypeople. This will involve considering a number of issues, some of which are relevant to my research but beyond its scope, including the separate role of Jesuits and of laypeople in this partnership and who gets to sign off on what Jesuit identity is in a particular setting.

Scene Four: My Spirituality

Context

During this period, alongside my substantive role leading Jesuit Social Services, I engaged more broadly with the global Jesuit enterprise, especially the social apostolate. Concurrently, my spirituality was deepening, particularly my engagement with Ignatian spirituality, through daily prayer, making the Spiritual Exercises and participating in an Ignatian pilgrimage and an Immersion Course. There is a reciprocity between my spiritual journey and the development of Jesuit Social Services. This is consistent with an Ignatian approach that appreciates the dynamic, reciprocal relationship between one's inner life and one's action in the world. As my understanding of the Ignatian story and Jesuit justice tradition deepened, I applied them within the organisation. The glimpse into my spiritual life in this scene sheds light on how it fed into the model I was developing, and its essentially Jesuit nature.

Experience

My experience in India, *Hesed* and beyond had brought home to me that being in solidarity with people and taking action in the world is a spiritual matter. At the beginning of this era, as the Jesuit world opened up, I recognised that as CEO I was in a privileged position to make a contribution to efforts to promote justice. Jesuit Social Services was a substantial organisation of more than 300 staff and 300 volunteers. I saw its capacity to contribute to this effort and, more broadly, I saw opportunities for the Society to do more to address suffering, violence and injustice.

My work continued to bring me face to face with people's suffering. The pain of the world often left me feeling bruised, but then, when God's spirit broke through, I was reminded 'to love the world as God loves it' (External presentation to education staff, 31-8-16). The experience of God's love as the foundation of reality influenced the approach

I took to our work. It was an invitation to be in solidarity with the world and its peoples, which was a spiritual concern for me.

> Crying about the pain, the poverty, the wickedness – abuse, exploitation of people and land – and I let the week rise up in me, all that I had absorbed. And I wept and I wept and wept … I asked myself basic questions such as: How did things get like this? How can we do this to each other? What is my response? What can I do? What can we do? Today's first reading and psalm moved me. The kind of fast God wants is 'to loosen the yoke, to give bread to the hungry'. (Diary, 19-2-10)

These experiences challenged me deeply, calling me to stand in solidarity with people, communities and the natural world. The invitation to cooperate with God's action in the world was a call to the *magis*: 'I saw again that nothing less is required than our full effort to stand with people and address injustice' (Diary, 19-2-12). This invitation was not about undertaking dutiful transactional activities; rather, it presented an opportunity to be in the flow of God's loving action in and for the world.

> It's not that God has given me lots so that I therefore should in turn give back – rather, it's a dynamic, a flow of love, a relationship between God and me, where a trueness to that relationship means the love flows; so as I receive, I give – all the same thing. (Diary, 15-5-12)

This evolving understanding of the dynamic, relational nature of love connected with insights about my own nature and the unity of all life. One day when I was meditating on the Contemplation to Attain Love, an exercise that comes towards the end of the Spiritual Exercises, I glimpsed this reality. It took me to a new level of understanding.

> I sensed, I understood, that God is in every atom of the universe, reverberating in each of my cells. That is God. Being. I am literally in the image and likeness of God, as are others. This joins me, all of us, to all creation. (Dairy, 28-8-09)

I came to see that God's essence is relational, permeating and actively sustaining all life. 'God delights in all this', I wrote in my diary. 'Keeps labouring in, through all things' (Diary, 15-5-12). This was an *interior* knowing about reality: the relational

essence, co-belonging, interconnectedness and oneness of everything emanating from love. More than being individuals who flourish in relationships, I saw that interconnectedness is our essence; that we don't exist outside of the set of relationships that form and sustain us internally (such as our neural pathways or the relationship between molecules) and externally (such as our relationships with the natural environment, family and community); and that we, in our turn, contribute to forming and sustaining these. This understanding points to our interdependence and also our agency, suggesting an unfolding and evolving interconnectedness, a dynamic reality where we receive and also create.

These insights about reality did not remain in a disembodied, spiritual realm quarantined from my professional life. They influenced how I viewed my purpose, the purpose of Jesuit Social Services and how I led the organisation. These melded with more conventional ways of knowing, often leading the way, but, as a minimum, undergirding and augmenting knowledge gained elsewhere. A diary entry from a retreat reflects this.

> I had an amazing experience of consolation. The unity of life, the God purpose of creation, the Oneness of all Being, the deep love of God, AND this appeared like a thread winding round the main areas in my life: like the people we accompany – the poor, prisoners, mentally ill, people bereaved by suicide, refugees and others; then our staff and our work, our very approach, including to advocacy and areas like ecology and Justice in Mining; also my personal life – my family wound up in this too. It was like a strong, supple vine coursing through all this, linking it, the one 'work', the one approach being opened up before me, and my moving in to it, with a deep sense of gratitude, tears. (Diary, 14-5-12)

From this foundational understanding of reality, I recognised that we thrive when these relationships are healthy and strong; conversely, the suffering and pain in the world can be viewed as expressions of these relationships being damaged or broken. The understanding that love, oneness and reciprocity of relationship are the dynamic we're invited into prompted me to recalibrate the organisation's purpose.

In applying this understanding that the nature of God and all creation is relational, I refined our purpose to focus on strengthening, healing and reconciling the web of relationships that holds us all. This purpose pointed to an approach of being in solidarity

with people and the natural world. This understanding of the essential nature of the person as relational refocused our practice to prioritise strengthening connections and propelled us further into relationship-based practice and restorative justice approaches. This is a very different starting point from seeing the individual as an isolated entity requiring a number of services to be transacted in order to deal with presenting problems. The recalibration of purpose and approach oriented us towards greater engagement with community across our practice and our advocacy, and it situated us firmly within the wider ecosystem of the natural world. It helped me navigate the community sector terrain that was increasingly falling under the spell of neoliberalism with its focus on business goals and metrics and funders purchasing segmented components of service delivery from us.

Reflection

My spirituality informed, nurtured and sustained all aspects of my life, including how I led Jesuit Social Services. My epistemology honoured interior knowledge and, consistent with Ignatian spirituality, this worked its way into my life in the world and then back into my prayer. During this period, my ontology of relationship across people, place and planet was expanded – from viewing people as benefiting from being in relationship to viewing them as being relational in essence, always and already enmeshed in relationships that constitute our very nature. These spiritual insights – along with reading the signs of the times, listening to what staff and program participants were telling us, and deep conversations with the board and leadership – contributed to the reorientation of the organisation. They impacted at all levels, from clarifying our purpose through to how we operated in the world. Significantly, they provided the compass to navigate the challenging operating context, all the while aiming to stay true to our purpose.

Scene Five: A Synthesis

Context

This, then, was my operating environment: a Jesuit world with the potential to do more to address suffering and injustice; an authorising environment in the Church to pursue this direction under Pope Francis's leadership; the Society's concern to ensure the Jesuit identity of their organisations in the midst of other challenges they were contending with; the scandal of sexual abuse in the Church; a massive retreat from formal religion; an increasing interest in diverse spiritual practices against the backdrop of a secular society;

the dominance of neoliberalism; harsher policies concerning some of the core groups we worked with, including prisoners and refugees; lack of kindness in the public discourse; little progress in addressing entrenched issues around race, culture and gender; and growing disparity between the rich and the poor, which were all occurring against a backdrop of increasing environmental destruction and climate change.

In the midst of this, Jesuit Social Services maintained its commitment to stand in solidarity with people on the margins of society. Addressing these matters was my priority – the reason the organisation existed. Alongside this, I led the organisation in an exercise to 're-imagine Jesuit Social Services'. This was an invitation to explore deeper, broader orientations in line with our purpose. It began with a closer reading of the signs of the times. In parallel, I revisited our Jesuit heritage and Jesuit Social Services' own history, and articulated the links between this heritage and the organisation's purpose and practice.

In this final scene, I bring earlier lessons that had deepened in me over the years. They are synthesised with developments from this era when I did the intensive work of articulating and then embedding Jesuit identity in the organisation. My focus in this scene is on the practice of fostering Jesuit identity and exploring three tools I used for this purpose: *one foot raised*, the Way of Proceeding, and the tree image. These are the fruits of decades of contemplation and action, exemplifying the relationship between the symbolic and practical, and social work and spirituality.

Experience

As we continued the process of 're-imagining Jesuit Social Services, three key strategic priorities emerged: ecological justice; building communities of justice; and gender justice. Ecological justice expanded our view of social justice to embrace environmental justice. It influenced how we understood ourselves in the world, which, in turn, impacted on our practice and advocacy, and our business processes. These insights ultimately contributed to a new articulation of our purpose. Through 'building communities of justice', the organisation committed to engage with people and communities in ways that sought to affirm their hopes and capacities, foster greater connectedness and promote citizen engagement. Beyond opening the organisation up to others to share our vision, we wanted to support people in their passion and efforts to shape the world for justice. Gender justice built on our work over four decades with boys and men who use violence.

We made a commitment to do more to prevent violence, to keep women, children and the broader community safe, and to help boys and men be their best selves.

These initiatives reflected our identity and served to reinforce it. They were given expression in specific works and, in addition, each was applied as a lens over all our activity. The very process of identifying and enacting them was facilitated by the three tools that I drew on to capture our identity.

One Foot Raised

When I first became CEO, I intuited elements from Jesuit heritage relevant to our identity as a community service organisation. Naming these had been important. But when I came across the words of Ignatius, calling on those who walk in this tradition to live 'always with one foot raised, ready to hasten from one place to another, in conformity with our vocation and our Institute' (Ignatius of Loyola, 1548–1550/1903–1911, p. 581), I saw the potential of this expression to bring those various elements together in a powerful, dynamic image that captured a Jesuit approach to our work and cued us to operate in line with this. I also started to use the visual image of a statue of Ignatius in motion that reflected this expression (Figure 5.3).

Figure 5.3 One foot raised

William McElcheran (1964). *Ignatius the Pilgrim* (sculpture). Guelph, Canada

Initially, I used the image of *one foot raised* (represented in Figure 5.2) to promote the qualities of being flexible, nimble, free, ready to respond – features closely aligned with striving for the *magis.* As I worked with this image, it yielded more insights. The statue shows Ignatius leaning into the wind, indicating that embarking on this path won't always be easy. The grounded foot reflects our approach of being rooted in our heritage, engaged with people and communities on the margins, tuning into our context, and learning from that experience. The hand on the heart reflects the importance of being

personally moved. I then explored the meaning of the raised foot that was poised for action and, importantly, the pause that exists before that foot is planted – taking time to see more, to understand more, to consider what our experience and the research is telling us, to reflect on what lies ahead. I noted that the pause does not lead to inertia because you can't stay with *one foot raised* indefinitely. You have to act, to put that foot down. But the pause gives you choice, it calls for a free response, and the possibility of putting the raised foot down somewhere where the pause has invited you to. It also highlights that where the grounded foot is planted will affect what you can see. If you are positioned in a place of privilege, then you will see different things from what is visible from a vantage point of disadvantage alongside those on the margins. This image captured the sense of an ongoing process, a way of being in the world:

> The image of living with *one foot raised* suggests a process, a dynamic. As soon as you put down the poised foot, the grounded foot lifts, and the process continues (External presentation to education staff, 31-8-16).

This image has both symbolic and practical value. I used it to capture and promote the essence of our way of being in the world in which we use grounded experience and a collective, realistic appraisal of reality to identify unmet or emerging needs in a timely fashion; continually exercise discernment for the *magis*; are nimble and available to respond; and use our organisational strength to initiate strong institution-based responses that endure. This spoke to people's imaginations. It also prompted us to operate in accord with the dynamic reflected in the image – to identify and make a choice to enact the three key strategic priorities: ecological justice; building communities of justice; and gender justice. But it was the Way of Proceeding framework that I drew on to operationalise such endeavours. This ensured that practical initiatives also served to embed Jesuit identity across the organisation.

Way of Proceeding

I continued to develop the Way of Proceeding framework, applying elements I intuited from Jesuit heritage: gratitude, centrality of relationship, discernment, *magis*, and contemplatives in action. Its centrality and power, both symbolically and practically, were enhanced during this time. Its symbolic merit lay in its power to galvanise staff to see themselves, and behave, in a distinct way that gives expression to our organisational identity. Practically, across the three domains of Human Spirit, Practice Framework and

Business Processes (see Figure 5.2), it translated into a number of individually tailored interventions to address need and to promote justice and ethical business practices. This was supported by documentation developed during this period, aimed at embedding our values into practice, including Jesuit Social Services' *Practice Orientation Manual* (see Appendix B for Contents page) and program logic diagrams (see Appendix C for examples). Perhaps more significantly, the Way of Proceeding provided an overarching framework to embed emerging organisational priorities across all activity, including the three strategic priorities. In relation to ecological justice, for example, I worked with staff to expand our view of social justice to embrace environmental justice by first engaging them in an exploration of what this meant at the level of Human Spirit. We grew in understanding that we are all interconnected and held in a web of relationships that includes the social and environmental world. This then extended to an exploration of the implications for the Practice Framework – that our practice and advocacy should reflect this understanding, propelling us to strengthen and heal relationships. It also extended to the Business Framework – that everything is a gift and our treatment of all resources should reflect this. By using the Way of Proceeding, I was able to ensure that ecological justice wasn't simply an add-on, or a series of resource management activities, but was embedded in every aspect of the organisational life.

The Tree as an Image of Organisational Identity

For years I used the Way of Proceeding framework as a tool to operationalise organisational identity. This framework reflected the understanding that elements from Jesuit heritage could be drawn from the central well and applied to the three domains, to nurture and sustain the integrity of each in line with our Jesuit identity. I used the *one foot raised* image to capture the essence of Jesuit identity that was contained in the central well.

In 2012 we relocated our central office. I was keen for the new premises to reflect our identity as a social change organisation committed to ecological justice. I came across a beautiful piece of art for the entrance foyer: a sculpture of a tree made from recycled copper, whose exposed roots are as extensive as the visible parts of the tree that are above ground (Figure 5.3). The casual but fortuitous decision to choose this sculpture fired my imagination and led me to explore, and ultimately adopt, the image of the tree as a symbol of organisational identity and how it is fostered.

When I started to use the tree image, I presented the roots in a similar way to the well at the centre of the Way of Proceeding framework – as the holder of Jesuit identity that is then applied across the organisation. The roots were a strong metaphor for depicting the foundations of the organisation: roots are extensive, they go deep, are usually invisible, and provide stability, endurance and sustenance. The branches, representing the programs, reach out into the world from the solid structure of the trunk, and the leaves reflect the staff engaged with the world. I was fond of saying that without the roots, the tree would perish.

Figure 5.4 Tree sculpture
Artist: Ulan Murray, https://www.ulanandrachel.com/

I became quietly obsessed with trees – noticing, studying, photographing and reading about them. As I experimented with the tree image, my thinking expanded. Unlike the well that speaks to a one-way movement from the well out to the three domains of people, practice and processes, the ecological image of the tree suggests a living, dynamic and reciprocal process. I saw that the roots by themselves, divorced from

the rest of the tree, are lifeless. They need the leaves, just as the leaves need the roots. I got very excited to read that the roots don't pump water and nutrients up to the leaves; rather, these are drawn up from the roots and, through the process of photosynthesis, the leaves transform energy from the sun into nutrients that feed and sustain the roots.

This prompted me to consider more deeply the dynamic between the staff and the heritage, with the staff playing an active role in drawing up the heritage (rather than this being 'pumped up' or 'into' to them as passive recipients). I recognised that staff not only bring the heritage to life through their day-to-day engagement with the world, but also nourish the heritage through this engagement.

The life and health of the tree depend on a continuous, dynamic interaction between all its parts, with each playing its role and each being in relationship with other parts. In the local park, a large branch dropped off my favourite tree and I observed how the fragmented stump was soon covered in tree sap, like a salve to a wound. I thought about how the healthy organisation rushes to assist a weak or damaged part of the entity. I saw that the tree's identity is held and expressed throughout the whole organism – its bark, its branches, its leaves, not just its roots – and I reflected that the dynamic interrelationship between all aspects of an organisation means that its identity is expressed in and through the shape and structure of the organisation: how we lead and manage, how we treat resources, how we conduct our meetings, how we treat people, how we provide services, and how we speak truth to power.

Trees interact with, incorporate, and adapt to their surrounding environment, both above and below the ground. I read about leaves emitting pheromones to protect them from pests and to alert neighbouring trees, and I thought about how staff sense threats to the organisation's purpose and seek to protect it; how they react to the dehumanising portrayal of the people we accompany and alert the community to the insidious erosion of human dignity. I read how roots respond to changes in the soil and noted how it is healthy, adaptive behaviour to live in reality as it is. I was amazed to read that through their roots, trees support and communicate with each other underground, and I noted that part of our job as a community service organisation is to strengthen the sector and not just look out for ourselves.

Recognising how trees play a broad function in their milieu made me think about civil society organisations and how we do more than the visible activity that people see. Trees contribute to healthy soil, binding it together. The leaves of a tree don't just send nutrients down to the roots, but sequester carbon, cleaning the air and making it healthier

for us all. That got me thinking about how civil society organisations don't simply operate for themselves and their obvious constituents, but for the broader community.

I saw one tree grafted on to another and thought about how a strong organisation can support another. I noticed trees whose trunks separated into two and thought about hybrid organisational identities. I lay under trees, watching how they sway in the breeze, moving flexibly in their environment and noted the importance of being strong yet adaptable, able to read the signs of the times and be responsive. I saw people sheltering under trees, birds perching on twigs, animals living in tree hollows, bees forming hives in the crooks of branches, and, beyond their functional purpose, I delighted in trees as things of beauty.

The ecological image of the tree captures much of what I have learned about organisational identity. When you talk about an organisation's identity, you are touching on the essence of the organisation – something particular and distinctive, something you can almost smell and feel, its DNA. A tree is distinctive. For example, it is a river red gum, not an oak tree. Yet each particular tree has been shaped by its specific context and circumstances, and observing this helped me see what was happening at Jesuit Social Services – things that I had glimpsed out of the corner of my eye but hadn't lifted up to consciousness, possibly because they did not fit with my existing thinking about organisational identity.

My starting point had been that Jesuit identity was a 'given', the gift of a nearly 500-year heritage, yet I witnessed staff engaging and creating it. I observed that when this occurs, it triggers a self-reinforcing dynamic whereby their engagement provides a base for the development of additional practical ways to further strengthen organisational identity. In this way, practical programs and other initiatives are then seen not simply as new activities but as expressions of organisational identity, which serves to reinforce that identity. I referenced the tree regularly when talking with staff about our identity. It was an accessible image they embraced enthusiastically and my own understanding of this phenomenon grew through this process.

The tree image opened my eyes to reality. It was only when I read the organisational identity literature in the course of my study that I became aware of different schools of thought in relation to this topic. I will return to this in Chapter 7.

Reflection

Jesuit heritage provided a deep reservoir of treasures to draw on as I worked to strengthen the organisation's identity in the context of the challenges of our contemporary setting. Through the exercise of 're-imagining Jesuit Social Services', I initiated a process that drew on this and our organisation's story, interpreted it for our times and demonstrated its practical value. I was the active agent in this process, reading and interpreting the heritage through my experience and synthesising it with that.

Throughout this era, I drew on my experience in India and *Hesed*, my professional life as a social worker and organisational leader, my study, and my spiritual life to interpret Jesuit heritage afresh. Identity was not an 'add on', symbolic branding, or a Jesuit badge; rather, it was infused within and across everything, and at all levels. The goal was to see it enacted, making a difference in the world. In part, this was a creative exercise, exemplified by my adoption of the tree image. I have been fascinated to reflect on how this working symbol has fuelled my understanding about organisational identity and how it is cultivated.

Final Reflection for Act Six

It was during this period, from 2008 to 2020, that I did the substantial work of engaging deeply with Jesuit precepts in order to do the 'double translation' of this heritage, first translating the founding narrative to render it accessible to organisational members and then translating this into an applied model that would give expression to the organisation's Jesuit identity. This work included fine-tuning a list of elements from Jesuit heritage that I used to foster this identity and developing, trialling and refining numerous practices – micro and macro – to implement and embed this identity. In this endeavour, I drew on my experience over decades as a practitioner of social work, leadership and Ignatian spirituality.

I knew the Jesuit tradition held treasures that could help shape a strong, values-based organisational identity. I also knew that it had to be translated and championed or it lay lifeless – that was my job as organisational leader. I also saw first-hand that organisational identity was constructed by organisational members, and that this is how it came to life. It was a gift to stumble across the tree image and then experiment and develop it as a representation of organisational identity. It engaged my imagination and my mind; it opened up new insights and encouraged me to try new practices, and ultimately allowed me to theorise about organisational identity. In Chapter 7, I reflect on it further in light of Ignatian and Jesuit heritage and organisational identity literature. I

bring these various insights together and present an enhanced model for fostering Jesuit identity of a community service organisation.

In concluding this final reflection, I return to three themes I identified in the broader Jesuit enterprise: the challenge the Jesuits face in the current context to enact their mission to promote justice; the reluctance to establish organisational responses in the social apostolate; and concern about how to ensure the Jesuit identity of their works. I did not develop my model in order to address these issues, but I encountered them in the course of my work. I draw attention to them here for two reasons: first, if they are not addressed, they present potential barriers to the implementation of my model; and second, my model might be of assistance in addressing these challenges. My assessment is that robust organisations in the social sector, and engagement of laypeople in these endeavours, is required if the Society's potential to fulfil its justice mission is to be realised. To that end, embracing contemporary, accessible and practical ways to foster the Jesuit identity of these organisations is essential. I am encouraged to note that the Jesuits have the foundations, orientation, lived experience and tools within their own heritage to resolve these three tensions.

Action

There are a number of lessons that I have taken forward to inform the model I present in Chapter 7: the insight that love is at the heart of everything; the relational nature and interconnectedness of all life; the recognition that everything is gift, highlighting the importance of gratitude and pointing to solidarity as our foundational approach; the universal nature of problems and also solutions, from the intrapersonal to the social and environmental; the call to the *magis*, which was reinforced in the face of so much need; and the fundamental role of discernment in ensuring we are free and available to respond.

During this period, my understanding of organisational identity grew significantly and was facilitated by the conceptualisation of the tree as a working symbol for this phenomenon. This image captured staff's imagination and highlighted the significant, recursive nature of their role in fostering organisational identity. These developments play a key role in shaping the model I present in Chapter 7.

Evaluation

I turn now to tracing the development, in the period covered by Act Six, of the elements and Way of Proceeding framework that I currently use in my work (Table 8).

Table 8. Elements, Act Six

Gratitude	Gratitude appears as an appreciation of our oneness, a natural response to the reality that everything is gift, and an awareness that gifts are a reflection of God's abundance, love and self-giving.
Relationship	My understanding of the centrality of relationship became more nuanced in this period as it shifted from understanding relationships as valued, even necessary to the human person, to understanding that the essence of the person is relational. Solidarity was strengthened through my engagement with people, communities and creation.
Doing	I fine-tuned my approach to focus on purposeful action, not just activity, directed towards the encouragement of greater participation and inclusion. I also recognised the importance of attending to people's deepest desires and fostering their sense of oneness with the natural world.
Influencing	This was expanded to include a stronger focus on influencing hearts and minds of various audiences towards social and environmental justice, and prioritising 'building communities of justice'. The complexity and interconnected nature of injustice called for a more holistic response.
Discernment	I saw this as a way of being in the world supported by formal and informal processes, including deep consolation that confirms desires, commitments and interventions.
Magis	*Magis* appeared as a willingness to be nimble and available to respond, and in the strengthening of the strategic impact of the organisation.
Contemplatives in action	Being contemplatives in action pulled together many of the features of our work.

In Act Six, The Way of Proceeding developed considerably. It was expounded in core documents, used to recruit, induct and develop staff, and became strongly embedded across the organisation.

A Synthesis of the Six Acts: Preparing for Action

Throughout this chapter, I have identified numerous features emerging from my personal experience that speak to Jesuit identity of a community service organisation. These are referenced in the Final Reflection, Action and Evaluation sections at the end of each Act. I provide a comprehensive list of these features in the following tables to show the wealth and nuance of the autoethnographic material that makes up the current chapter. Table 9 presents those features that best align with the seven elements and Way of Proceeding framework that I currently use in the course of my work. Table 10 lists a number of additional themes and features that I identified through the autoethnographic process. I will draw on these in finalising the updated list of elements that speak to Jesuit identity. Table 11 presents the features that relate to the Way of Proceeding and its three domains.

Table 9. Elements, six Acts

Gratitude	• A foundational orientation • About finding God in all things • A natural response to the reality that everything is gift • Implicit in the ordinary, day-to-day bonds that sustain us all
Relationship	• Central to any response • Should be authentic and reciprocal • Requires presence and availability • Should be deep and strong • Formed through small, incidental acts of kindness • An appreciation for and sharing of ordinary life • A way of being • A gift to be received not earned • A way to learn about what's going on • An enticement to go the extra mile • An essence, more than an approach
Doing	• Belongs to the sphere of grounded experience • Has a clear purpose • Involves taking stock of the person in front of me • Involves treating each person as I want to be treated • Involves attending to people's deepest desires • Heals and strengthens relationships • Requires skilled interventions • Requires awareness of the impacts of our actions • Requires standards of care and oversight • Can be directed towards building communities
Influencing	• Essential to our purpose • Informed by grounded experience • Informed by social analysis • Operates at different levels • Targets hearts and minds • Works to address structural injustice, social and environmental • Works to address root causes
Discernment	• Involves reflecting and acting on lessons emerging from practice • Engaged at the team level • Fosters the freedom to lead • A way of being • Important for *magis*
Magis	• The desire to better live out our values • The desire to make the greatest strategic impact • The desire for more influential action • The desire to maximise minimal resources
Contemplatives in action	• Cultivate the interior life • Possess *interior knowledge*, gained through embodied lessons • Are a way of being in the world • Express the relationship between inner and outer worlds • Are agents in the world • Take responsibility for what they see whatever their status • Possess the right personal attributes to do the work • Are skilled, appropriately trained and supported staff

Table 10. Additional themes, six Acts

Love	• God is love • God loved everything into being • God's love is abundant and self-giving • God loves the world • Love the world as God loves it • Live and act in flow of God's love
Oneness	• All life is One • All life is interrelated • Social and environmental justice injustice are interconnected • Our social reality is made of broken and enduring bonds • The essence of the person is relational
Universality	• Poverty is extensive and interconnected • Suffering and injustice are complex and interrelated • The problems of the world aren't 'out there' and of someone else's doing • We are all interconnected • I am neither exempt nor above responsibility • I benefit from the way things are
Generosity	• Sharing our lives • Believing the best
Realistic appraisal of reality	• Engaging with reality as it is
Availability/mobility	• Being open to where something is heading • Being ready, nimble and available
Solidarity	• Entails seeing the person in front of me • Acknowledges the relational nature of everything • Refers to reciprocal relationships • Informs practice • Moves beyond caring to address injustice • Recognises the bonds between people, place and planet • A foundational approach
Documentation/record keeping	• Articulates core statements • Articulates models of practice and policies and procedures • Supports collective identity and shared purpose to hold and guide all actions
Teams	• A good team is one in which people feel safe and supported and are confident in their purpose • Developing a team takes time and care • Processes for discernment and reflective practice should be embedded in work routines • A strong team practises regular discernment to identify unmet need • Members of a strong team support one other to be faithful in this work • Teams work well when members understand themselves as *contemplatives in action*

Table 11. Features of Way of Proceeding framework and the three domains

Way of Proceeding framework	• Relates each aspect of life to others, producing integrity across the various dimensions • Indicates the quality of relationship between values, practice, behaviour and organisational processes • Emphasises the importance and interrelationship of human spirit, practice and business processes
Human Spirit domain	• Cultivation of the interior life • Regular practice of reflection • Courage and humility • Direct experience underpins intervention, policy and advocacy work • Privilege and injustice are structured into our beings at many levels
Practice Framework domain	• Clear purpose for the *doing* • Skilled, deep, relationship-based work • Attending to people's deepest desires • Addressing underlying trauma and loss • Strengthening family and community life to hold people • Fostering understanding of interconnectedness – person, community, society, environment • Encouraging people's greater participation and inclusion • Enhancing civic participation • Connecting policy and program areas • Working at different levels, from engagement to advocacy • Addressing structural injustice, social and environmental • Addressing root causes • Influencing hearts and minds • *Building communities of justice*
Business Processes domain	• Practice quality • Solid systems, processes and strong oversight • High standard of care • Potential of institutions to provide good practice and be instruments for social and environmental justice

Conclusion

The rich body of material that emerged through the autoethnographic process traced the antecedents for my current knowledge, teased out their deeper meaning and revealed new knowledge that contributed to my model. The process revealed that my commitment to those on the margins was awoken in India, deepened in *Hesed*, and refined and consolidated since that time. My understanding of the centrality of relationship and being in solidarity with people in need was initiated in India and has become deeper and more sophisticated over time, moving from a focus on engagement to appreciation of our essential nature as relational.

I only truly understood the important marriage of 'doing' and 'influencing' during my time at Jesuit Social Services, particularly in the years represented in the final Act. *Magis* was always important to me, but only at Jesuit Social Services did I come to

understand its deeper meaning. I learned that it is not solely about doing more or going the extra mile, but ensuring action is connected to purpose. I also learned to look for strategic impact.

It was during my time in *Hesed* that I developed the foundations for a strong spiritual practice. The years represented in the final Act of my autoethnography built on this base, and in that latter period, my desire and capacity to live as a 'contemplative in action' deepened. This is strongly linked to my growing sense of gratitude.

Hard won lessons in *Hesed* taught me the importance of knowing 'who you are' as a collective; this formed the basis of my later practice of fostering organisational identity. While I glimpsed the necessity for integrity across personal and operational processes and practices during my time in India, it was in community that the interconnectedness of these domains was brought home. This was the foundation for the Way of Proceeding framework I developed at Jesuit Social Services, where I translated and consolidated earlier lessons within an organisational context.

Powerful themes emerged that were not captured in the elements that I had initially intuited, nor in the Way of Proceeding framework I developed. The importance of love had always been present in my life but not elevated to its rightful place, perhaps because it was more of a backdrop to action, rather than its essence. Spiritual experiences, especially during more recent years, helped my understanding of our essential oneness to evolve. My exposure to suffering through engagement in the wider Jesuit enterprise highlighted the interconnectedness of both social and environmental injustice, and also potential solutions. It pointed to solidarity as a foundational approach. In prayer, I touched on my desire to be free and available for service and my recognition of where this was lacking. The organic, ecological image of the tree brought together many of the insights and lessons from across my life. It has been my creative muse these past years.

Reflecting from my current perspective on my experience, as charted across my autoethnography, I note the richness of material that has emerged. Writing in the autoethnographic mode has allowed me to recognise the deep history underlying each feature and the model for organisational identity that I am developing. In tracing the origins of this material, I recognise that my insights were hard won. They are etched into my being. They are embodied, 'felt knowledge'. It explains my passion for them.

In line with the Ignatian Pedagogical Paradigm, I now move from Experience (the current chapter) to the component of Reflection (Chapter 6), where I reconsider a body of

material I am familiar with – Ignatian and Jesuit heritage – in order to penetrate its deeper meaning as it relates to my study. In Chapter 6, I review Ignatian and Jesuit sources to identify elements that speak to the Jesuit identity of a community service organisation. In Chapter 7, I bring the material from the three sources of knowledge – personal, Ignatian and Jesuit – from Chapters 5 and 6 into dialogue with each other, distilling findings in order to capture the essence of the knowledge that has emerged.

CHAPTER 6

Reflection

One meaning of reflection within the Ignatian Pedagogical Paradigm is to reconsider a subject for the purpose of grasping its meaning more deeply. In this chapter, I revisit a body of material I am familiar with – Ignatian and Jesuit heritage – and reflectively review it in order to provide depth to the model I present in Chapter 7. In reflectively reviewing Ignatian and Jesuit heritage in this chapter, I draw on some of the same documents I examined in Chapter 3. As such, there is some overlap in the material covered in these two chapters but each has a different focus. In Chapter 3, I provided an overview of the history of the Society of Jesus and traced its commitment to the promotion of justice from its establishment to the present day. In the current chapter, my purpose is to identify specific features from Ignatian and Jesuit heritage that have emerged in the light of my existing knowledge – namely, the seven elements and the Way of Proceeding framework. This allows me to demonstrate the features of Jesuit epistemology that support this doctoral research in its aim to foster the Jesuit identity of a community service organisation in a contemporary context. The material in this chapter also allows me to reflect upon how my existing model might be enhanced, and whether I have overlooked some features that should be brought forward to strengthen it.

The reflective review of Ignatian and Jesuit heritage draws and builds on what I've read, heard, prayed over, imagined, spoken and written about, and absorbed through osmosis throughout my life. Over the past twenty years since commencing work at Jesuit Social Services, my engagement with this material has been more intentional and intense (for example, in undertaking a pilgrimage, participating in an Ignatian Immersion Course and participating in spiritual direction). Over those years, I did not engage with this material as an academic, but rather, as a practitioner keen to draw lessons from this heritage to apply in my work setting.

For the purpose of this research, I began a process of more formally and reflectively reviewing Ignatian and Jesuit heritage five years ago. This involved taking a step back to read or re-read source material and key documents in a more thorough and systematic way. I am aware that the documents I examine hold deep spiritual significance for the Society of Jesus and those engaged in the Jesuit tradition. Garcia de Castro describes the sources as living documents that are 'open to become known and interpreted in different times and places' (2009, p. 328), which should be entered

'experientially' (2009, p. 314). This aligns with the approach I take to the sources. I do not examine them from the perspective of a historian, theologian or specialist in an associated field, but as a laywoman, a social worker and a leader of a Jesuit organisation who has engaged directly with these texts, Ignatian spirituality and Jesuit legacy over a number of decades.

In this chapter, I begin my reflection on Ignatian heritage through the prism of the life of Ignatius. The narrative of Ignatius's life is upheld within Ignatian tradition as a historical, allegorical and spiritual account. As previously explained in Chapter 3, the charism of the Society of Jesus originates from the story of the life of Ignatius and is given expression 'historically and institutionally' (Garcia de Castro, 2009, p. 312) in the Society. Given that Ignatian spirituality is the foundation of Jesuit identity, and can be described as a spiritual 'way of proceeding' (Fleming, 2008, p. vii), I then turn my attention to the 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g), which are at the heart of Ignatian spirituality.

Following my review of Ignatian heritage, I then turn to the Society of Jesus and Jesuit heritage to examine the founding documents of the Society, the 'Formula of the Institute of the Society of Jesus' (Ignatius of Loyola, 1540/1996d, 1550/1996e) and the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c). The latter is considered to be the text that 'keeps the basis of Jesuit identity safe' (Coupeau, 2010, p. 5). Looking beyond these texts to Ignatius's correspondence, which as O'Malley (2013) notes, is a rich and extensive source for analysis of the Society, I select two letters that provide insights relevant to my topic. I then reflect on documents of the General Congregations of the Society, which exemplify the contemporary perspective of the Jesuits. As noted by Padberg, O'Keefe and McCarthy (1994), the work of each General Congregation was informed by its era with an 'explicit awareness of the opportunities and problems bearing upon the Society' (p. 2). As outlined in Chapter 3, at General Congregation 32, the Society underwent a significant renewal of its mission. For this reason, my analysis and reflection focus on documents from this General Congregation onwards.

My reflective review of Jesuit heritage also ranges beyond the key documents referred to above. This includes numerous editions of *Promotio Iustitiae* and other Jesuit communications within the social apostolate, in addition to the many meetings I have attended and conversations I have had with Jesuit and lay colleagues around the world. In reviewing material relating to the social apostolate, I revisit current debates, which relate

to the enactment of the Jesuits' mission to promote justice, the role and purpose of the social apostolate and the place of institutions within it. These factors point to potential barriers to the implementation of my model in the contemporary context.

The Story of St Ignatius of Loyola

In this section, I provide a brief biography of Ignatius and a summary of Ignatian spirituality. Much has been written about both these topics. I do not attempt a comprehensive account of either; rather, I reflectively review aspects of them with an eye to detect key elements relevant to Jesuit identity in a community service setting.

Some of the origins of Ignatian heritage lie in Ignatius's early life and his time as a layman and a pilgrim before he established the Society of Jesus. He was born circa 1491 (Munitiz & Endean, 1996), into a world that was on the brink of significant change and into a church in need of reform. This was an era where the certainties of life were melting away; an era where boundaries, geographic and other, were being stretched way beyond the horizon of familiarity. As a Basque, he was proud of his heritage and culture, but his exposure to stories from distant worlds gave him an appreciation of people and places beyond his own world. This combination might have influenced his later approach and spirituality and points to a dual orientation toward particularity (of place and culture) and a universal perspective.

As a youth of fifteen or sixteen years, Ignatius was chosen by his father to continue his education in the house of a nobleman, the Treasurer of Castile, Juan Velasquez de Cuellar in Arevalo, where he remained for ten years. Following the death of Juan Velasquez, he was appointed as a gentleman-in-waiting for the Duke of Najera, Viceroy of Navarre (Munitiz & Endean, 1996). Perhaps this period encouraged Ignatius's valuing of record keeping and documentation (for personal use and ultimately for the benefit of others). It might also have led to his ease with people of influence and his preparedness to petition them to achieve desired outcomes. Ignatius had heroic ambitions, and as a young man he was 'given up to the vanities of the world, and his chief delight used to be in the exercise of arms, with a great and vain desire to gain honour' (Da Câmara, n.d./1996, p. 13, n. 1).

Ignatius's Conversion and Life as a Pilgrim

In 1521, Ignatius was involved in a battle where he was badly wounded and brought to Loyola to convalesce (Da Câmara, n.d./1996). During this nine-month period, he read, at

first reluctantly, the only books available: *Life of Christ* and *Lives of the Saints* (Caraman, 1990). Ignatius reflected on his past life with remorse and had a deep and consoling experience of God's love for him; he was overwhelmed by the gift of this love and felt deep gratitude, which prompted generosity and 'great desires' to do wholehearted service (Da Câmara, n.d./1996, p. 18, n. 14). This period marks the beginning of his understanding of discernment, where 'his eyes were opened a little', and he gradually came 'to know the difference in kind of spirits that were stirring' and how he might understand these (Da Câmara, n.d./1996, p. 15, n. 8).

Ignatius's spiritual life was just beginning, but the idea of being a *pilgrim* was significant to him and he continued to refer to himself in this way all his life (Da Câmara, n.d./1996). At this time, all his efforts were focused on reaching Jerusalem. He put away his sword at Montserrat, symbolising his decision to move away from his former life (Caraman, 1990). He also gave away his fine clothes to a poor person, marking his desire to take on a life of poverty and penance. This was also an act of compassion, and Ignatius cried when he learned that the recipient of this gift was mistreated because he was suspected of stealing these fine clothes (Caraman, 1990).

From Ignatius, we learn that to be a pilgrim is to be on a journey, from our ego and self-interest, to meet the *other*: God, the person on the margins, and our damaged natural world. His act of placing his sword on the altar at Montserrat (Caraman, 1990) teaches us that sometimes a symbolic gesture is a powerful way to signal a new direction, while his compassionate encounter alerts us to the reality that our actions to assist people and tackle injustice may have unintended consequences.

Ignatius's time in Manresa in 1522 was very significant and is particularly rich with lessons for our work, at Jesuit Social Services, with people on the margins. He underwent an enormous spiritual struggle, becoming suicidal. Ignatius says of this time that God was dealing with him 'in the same way as a schoolteacher deals with a child, teaching him' (Da Câmara, n.d./1996, p. 25, n. 27). A valuable lesson from Ignatius's experience is the importance of treating each situation and person as unique, with a story, talents and gifts. This points to an approach of accompanying people as their possibilities unfold.

During his sojourn at Manresa, Ignatius learned that no amount of willpower could bring about the interior growth and change he was seeking. He experienced the gift of God's generous love, freely given. With this insight, he 'left aside those eccentricities he had from before' (Da Câmara, n.d./1996, p. 26, n. 29), signalling his decision to adopt

a life-affirming disposition, rather than the punitive approach he had taken thus far – an important lesson for those who walk in this tradition.

At Manresa, Ignatius had a number of mystical experiences that were deeply transformational (Caraman, 1990). He experienced these as gift; they were not simply intellectual insights, but lived experiences that transformed him to his core. Such experiences do not render themselves easily to description or analysis, but his insight into the Trinity appears to me to be the seed of his understanding that God's nature is relational, and that our nature is relational. By the Cardoner River, he had a mystical experience that left him feeling that 'all things seemed new to him' and that 'he were a different person, and he had another mind, different from that which he had before' (Da Câmara, n.d./1996, p. 27, n. 30). This experience seems to have given Ignatius an insight, a *felt knowledge*, into the interconnectedness of life, with everything proceeding from and returning to God (Caraman, 1990). Just as Ignatius's *inner eye* was opened to see deeper dimensions of reality, we, too, are prompted to see beyond what is visible.

Through his experiences at this time, Ignatius had insights into the workings of the human heart. With his appreciation that everything is gift came the insight that these gifts (talents, resources, insights, knowledge and power) are not our *possessions* to hoard or gloat over, but are gifts to be received with gratitude and shared generously. This understanding leads to a desire to be free of 'disordered attachments' (Ignatius of Loyola, n.d./1996g, p. 283, n. 1), which impede us from living a life of greater love and service.

Ignatius's understanding of discernment strengthened during this period. He developed his practice of noting down what was happening and what he was learning; from this came his legacy to the world, the 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g). Discernment is the basis of good decision-making and enables us to choose freely what is life-giving and for the greater good. This can be seen as a process which begins with an honest appraisal of a situation, comprising an internal and external dimension: the internal involves reflecting on experience and unpacking our motives and attachments that deprive us of freedom; the external involves reading the signs of the times and taking account of what the research and literature indicates.

At this stage, Ignatius had one plan: to go as a pilgrim to Jerusalem. He set off in 1523. There were many trials associated with the journey and he was disappointed to be allowed to stay only twenty days (Da Câmara, n.d./1996). A lesson from this experience is the importance of ongoing reflection on experience. Ignatius pursued his dream of going to Jerusalem for many years, but ultimately, he was free to abandon it when life

took a different course. Ignatius's experience as a pilgrim reminds us that even a long-held belief in a 'worthy' cause should be open to review.

Ignatius the Student and His Companions

From 1524 to 1527, Ignatius begged for survival, studied and guided people in their spiritual lives (Caraman, 1990; Da Câmara, n.d./1996). He gathered a few companions around him and his influence did not go unnoticed. The Spanish Inquisition investigated and imprisoned him, and while 'no error could be found either in their way of life or in their doctrine' (Da Câmara, n.d./1996, p. 47, n. 70), restrictions were placed on him until he had undertaken further study. Ignatius decided, therefore, to prioritise his education and went to Paris to progress his studies there. He was able to take a long-term view about his vocation and commit to doing what was necessary in order to equip himself adequately for his future work. This is consistent with Ignatius's later focus on ensuring his companions were well educated and prepared for their work.

From 1528 to 1534, Paris was Ignatius's base. He continued his lifestyle of studying, begging and *helping souls*, which involved talking with people about their deepest desires, taking people through the Spiritual Exercises and providing practical assistance (McManamon, 2013). This latter feature continued to characterise Ignatius's life and priorities until his death, and can be taken as fundamental to those who walk in this tradition. It later translated into supporting the establishment of institutions for this purpose (McManamon, 2013). It also involved advocating for social reforms in keeping with humanists of the time, such as Vives with whom he spent time during this period (Caraman, 1990; McManamon, 2013).

Ignatius guided two young fellow students, Peter Faber and Francis Xavier, through the Spiritual Exercises, a foundational and transformative experience for them (Da Câmara, n.d./1996). This highlights the importance of discerning our own meaning and purpose, and assisting others in this too. His way was to relate to each person differently, according to the person's personality and character, always seeking to ascertain the person's suitability for the task. Ignatius, Francis Xavier and Peter Faber, along with four other companions, made vows together at Montmartre in 1534 – not traditional vows (poverty, chastity, obedience), but 'original vows' of going to Jerusalem, and, if that were not possible, to put themselves as the service of the Pope (Caraman, 1990). Members of this small international group came from Spain, France and Portugal (Caraman, 1990). There was little clarity about what expression their

commitment might take, but they did share one approach: trust in God and an attitude of openness as to where that might lead them (Tellechea Idígoras, 1994).

From the time Ignatius took the path of *helping souls*, he was subject to criticism, misrepresentation and persecution. He was silenced, sidelined and jailed. When this treatment represented a present or future threat to his work, or the work of the companions, Ignatius challenged it, drawing on his networks and people of influence to vouch for the benefits of his activity (Caraman, 1990). Ignatius's experience also suggests that those standing up to effect change can expect harsh treatment.

In 1535, after completing his studies, Ignatius returned to Azpeitia, where he insisted on staying in the local hospice, not his family home (Da Câmara, n.d./1996). He begged daily for his living and to give alms to the poor, and continued his practice of preaching and having spiritual conversations with people. He addressed a number of injustices in his local town and made provisions for poor people (Da Câmara, n.d./1996), both at the personal and institutional level (Alvarez de los Mozos, 2019). This demonstrates willingness to work in different domains, from direct service through to addressing structural injustice.

The companions reunited in Venice in 1537, along with new recruits to their ranks (Da Câmara, n.d./1996). They continued their practice of attending to the needs of people in alms houses, dividing into groups 'in such a way that they were always from different nations' (Da Câmara, n.d./1996, p. 59, n. 94). The deliberate mixing of people from different countries speaks to the international character of enterprises that follow in this tradition. This period was a time of deep communal discernment. Reflecting on their reality and circumstances, they agreed to abandon their dream of going to Jerusalem and decided to meet in Rome to put themselves at the service of the Pope (Da Câmara, n.d./1996). This demonstrates a willingness to take a realistic appraisal of reality, to reflect on experience, to take into account the collective wisdom of the group, and to be free to change direction based on that discernment. Ignatius and the companions were on their way to Rome when, at La Storta, he had a mystical experience that confirmed this decision (Caraman, 1990; Da Câmara, n.d./1996). Ignatius experienced God's invitation to companionship and service, and foresaw that this would involve suffering. This experience highlights the significance of these elements for us.

Ignatius and the Founding of the Society of Jesus

The next few years in Rome were not without their difficulties. For the eighth time, Ignatius was required to prove his orthodoxy. With the matter resolved, Ignatius and the companions drew up the 'Formula of the Institute' (Ignatius of Loyola, 1540/1996d), which set down the fundamentals of the new order. Against his wishes, Ignatius was elected superior by his companions in 1541 (Caraman, 1990). He took on a very different role from the one he had envisaged for himself in becoming an administrator (Caraman, 1990). This reminds us that we need to discern what is the greater good, to be free to respond, and possibly to change direction.

During this period, Ignatius laboured over key documents that set the direction for the group then and into the future. He spent years crafting the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c), which would go on to be used or adapted by other religious orders (see, for example, Loreto Australia and South East Asia, n.d.). This highlights the value of taking time to discern adequately what is emerging from experience and underlines the importance of documentation and record-keeping to create a written legacy that can be adapted for use by others. Far from being a blueprint, the Constitutions, similar to the Spiritual Exercises, 'offer a "way of proceeding", a way of handling realities as yet unforeseen' (Endean, 2008, p. 64), rendering them open to interpretation in particular circumstances. This points to the value of having sound foundations to draw on, accompanied by strong processes of discernment to ensure responses are relevant, timely and tailored to the current reality.

Ignatius kept people well-informed and communicated regularly with companions and others, especially those who were isolated or facing other challenges. There are nearly 7,000 letters and documents written by Ignatius, or under his direction, still in existence (O'Malley, 1993). This communication was for strategic purposes and care of people. He continued to spend time with poor people and working for structural solutions to problems they faced. He established institutional responses to address local problems and engaged laypeople to support and run these works to ensure sustainability. This shows the importance of trusting others and delegating responsibility. It is worth noting that Casa Santa Marta, a refuge for prostitutes, was one of the first institutions established by the Society (O'Malley, 2013).

Ignatian Spirituality

The 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g) are the basis of Ignatian spirituality, which lies at the heart of Jesuit heritage and the Jesuit way of being in the world. They are a series of meditations divided into four *weeks*, or time periods, each dealing with different themes. The Exercises are undertaken during a retreat, under the guidance of a spiritual director, and usually conducted over a period of thirty days. The aim is to assist retreatants to order their lives, to gain an interior knowledge of Jesus and to find God in everything. The meditations help them to become free from attachments that hinder their path to finding their purpose in life. This fosters a general facility for discernment in daily life and the transformation of the person's heart toward a life of love and service. In reflecting upon the Exercises, I identified elements that also speak to the themes of responding to people in need, to social problems and social injustice. I now examine the Exercises to identify elements that relate to work in the social sector, relevant to my model.

The 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g) begins with a meditation on the 'Principle and Foundation' (p. 289, n. 23). The first sentence spells out the purpose of the human person 'to praise, reverence and serve God' (Ignatius of Loyola, n.d./1996g, p. 289, n. 23). It introduces the foundational insight that all things are a gift emanating from God's unconditional love. This is the starting point of Ignatian spirituality and leads to an attitude of gratitude, which calls for a response from the person making the retreat. Ignatius then introduces the key Ignatian concept of *indifference* in order to foster our freedom. Building on the understanding that all things are gifts, not our possessions, we are guided to appreciate that these gifts are to be used or set aside depending on whether they lead us to, or divert us from, our purpose, as set out in the first sentence. The principle of indifference, applied at the personal and organisational level, encourages us to be indifferent to, for example, riches and power, while leaving us free to use these for the greater good. Continual discernment is required to ensure there is a freedom and confidence to use such gifts while not being seduced by them.

In the First Week, retreatants are invited to consider the problem of evil in the world, how we are personally caught up in it, and how God is loving and merciful in the face of this. This encourages a reflective disposition, to acknowledge our own privilege, and to refrain from seeing the *other* as the problem. The 'Examen', a key tool to foster discernment in daily life beyond the time of making the Exercises, is introduced (Ignatius

of Loyola, n.d./1996g, p. 290, n. 24). Its regular practice helps us become more aware of the various feelings and interior movements we experience, to understand what these might be telling us about what is, or is not, life giving; and to identify possible patterns and connections between these movements. This creates the possibility of our being free to choose actions that express wholehearted love and service, reflecting the *magis*.

In the transition between the First and Second Weeks, a meditation, 'The Call of the Earthly King' (Ignatius of Loyola, n.d./1996g, pp. 303–304, n. 91–100) is introduced. This meditation foreshadows the invitation that is coming for the retreatant to choose her/his direction in life. It gears the person for action.

In the Second Week, the meditations focus on the person of Jesus. The aim of this Week is for the retreatant to make a choice about the fundamental direction about her/his life. A key meditation in the Second Week is the 'Incarnation' (Ignatius of Loyola, n.d./1996g, pp. 305–306, n. 101–109), where the retreatant is invited to see a relational God, the Trinity, looking at the world in all its variety of peoples, lands and circumstances and to see the suffering of people. Throughout this meditation, we are invited to see the world with God's eyes, which locates the source of action and response with God, not us. This sets the scene for our collaborating with God in this work of love and justice, and steers us away from seeing ourselves as saviours on whom all things depend. In presenting the diversity of people and places, the suffering of humanity and God's loving response, the meditation on the 'Incarnation' (Ignatius of Loyola, n.d./1996g, pp. 305–306, n. 101–109) promotes a deep concern for persons in their lived reality. At the same time, it shows us a high-level view of suffering and social problems. It lifts our gaze beyond our familiar horizon and underlines the universal nature of issues of concern. From the foundational insight that God's very nature is relational, we are invited to appreciate the relational nature of everything. This orients us to see our purpose in terms of fostering healthy relationships and healing broken bonds.

Also in the Second Week of the Exercises, Ignatius introduces the retreatant to meditations on the 'Two Standards' (Ignatius of Loyola, n.d./1996g, pp. 310–312, n. 136–148), leading the person to clarify her/his values as a preliminary step to making choices for action. This helps us avoid the trap of believing that our actions always come out of a concern for the other and to be alert to the seduction of 'riches, honour, pride' (Ignatius of Loyola, n.d./1996g, p. 311, n. 142). This meditation encourages us to discern our motives in order to understand how these drive our activity, including our treatment of people, our willingness to collaborate, our approach to service delivery and advocacy.

A variation on the seduction of pride is the trap of false humility leading to inaction in the face of the world's need.

In the Third Week, meditations on Jesus's life continue, focusing now on his passion and death. The example of Jesus's stepping away from power reveals the essential nature of God as love, surrender and vulnerability. This is a prompt for us to step away from an ego-driven approach, and to live and work in the flow of God's love. Retreatants are brought face-to-face with the reality that in choosing to live a life of love, service and truth and confronting power, they, too, might face painful consequences. This alerts us to the importance of remaining faithful in difficult circumstances.

In the Fourth Week, meditations focus on the resurrection and other mysteries. At the end of the 'Spiritual Exercises' (Ignatius of Loyola, n.d./1996g), there is a meditation titled 'Contemplation for Attaining Love' (pp. 329–330, n. 230–237). This meditation invites the retreatant to see that God is not only present, but 'labours' in all things (Ignatius of Loyola, n.d./1996g, pp. 329–330, n. 230–237). Ignatius (n.d./1996g) introduces this meditation by making the point that 'love ought to find its expression in deeds more than in words' (p. 329, n. 230) and that 'love consists in mutual communication, i.e. the lover gives and communicates to the beloved whatever the lover has or is able to give, and the beloved in turn does the same for the lover' (p. 329, n. 231).

This meditation points to God's nature as love, relationship and communion. Ignatius saw that there is a unifying mystery at the heart of life, that God is in everything, and that everything is gift. The meditation underlines that there are no limits to God, to God's love, to God's presence, or to active engagement and action in the world. This encourages a universal approach to the work. It fosters in us the art of being a *contemplative in action* (see Nadal, 1898). It calls for prioritising action over words and reinforces the understanding that action carried out in love is about reciprocity of relationship. This call to action reminds us that it is not enough to feel concerned about a problem or to simply analyse and study it; in this tradition, we must act. Ignatius calls us to a particular kind of action, however. It is a call to act with love. It is not about *doing something* to the other or seeing oneself as the giver and the other as receiver; rather, it is about mutuality and reciprocity, entering into a relationship where there is genuine respect and openness to be transformed by engagement with the other. In the service of others, the gift of love prompts gratitude and calls for a generous response, helping us avoid a problem-saturated response to the suffering and social problems we encounter. It

encourages a strengths-based approach that looks for and builds on the positives in people, communities and situations. It engenders hope.

Summary of Findings: Ignatian Heritage

In concluding this section, I now provide a comprehensive list of features that speak to Jesuit identity of a community service organisation. These features have been drawn directly from my reflective review of Ignatian heritage presented above. In Table 12, I present the features that align with the seven elements that I currently use in the course of my work. Table 13 presents a number of additional themes and features that I identified through the reflective review of Ignatian heritage. I will draw on these in Chapter 7 when I finalise the updated list of elements that speak to Jesuit identity. In Table 14, I present the features that relate to the Way of Proceeding and its three domains.

Table 12. Features from Ignatian heritage for elements

Gratitude	• A gift of love • A life-giving orientation • Reminds us that everything is a gift • Reminds us that gifts are shared generously
Relationship	• Central • Basis for all activity • Foundational to solidarity • Reciprocal
Doing	• Being close to those in need • Serving those in need • Treating each person as an individual with a unique story, talents and gifts • Taking a life-affirming approach • Recognising that you are not the expert on another's life • Walking with people as the possibilities unfold • Attending to deepest desires
Influencing	• Addressing structural injustice • Drawing on others to achieve outcomes • Using networks to help resolve matters • Engaging and being at ease with people of influence • Expecting harsh treatment but remaining faithful
Discernment	• Reflecting on lived experience • Discerning motives and attachments that deprive us of freedom • Discerning in daily life for life-giving choices • Taking time to discern the greater good • Reading signs of the times • Making an honest appraisal of any situation • Examining research and literature

	• Being free to respond, to learn from experience and to change direction • Attaining freedom through indifference • Acknowledging collective wisdom • Recognising that actions have unintended consequences
Magis	• God's invitation to companionship and service • A calling to be part of God's work • Comes from great desires • Works for the greater good • Asks us to make a choice • Inspires wholehearted love and service
Contemplatives in action	• Have heroic ambitions • Honour felt knowledge • Take a pilgrim approach • Have deep concerns and longings • Are appropriately skilled to do our work • Step away from an ego-driven approach and live and work in the flow of God's love

Table 13. Features from Ignatian heritage for additional themes

Love	• All things are a gift emanating from God's unconditional love • Unifying mystery at the heart of life • Love, relationship and communion reflect God's nature • Love is the main energy in our life and is expressed more in deeds than in words
Interconnectedness/oneness	• God's nature is relational, our nature is relational • All creation is interconnected • Everything proceeds from and returns to God • Everything is relational • God is in all things, labouring in all things
Universal	• Universal dimension • International character • Global nature of issues, expressed in local situations
Available/mobile	• Being rooted in place and culture while being open to the universal dimension • No boundaries
Generosity	• Gratitude calls for a generous response • Wholehearted service • Life of greater love and service
Solidarity	• Recognising the interdependence of all peoples in one common heritage • Ensuring services work *with* those in need • Commitment to the poor as the main criteria guiding personal and organisational decisions • Addressing structural injustice • Recognising relationship as a foundation for solidarity • Relating with mutuality and reciprocity • Remembering that we are not the experts on another's life

	• Walking with people as the possibilities unfold • Stepping away from an ego-driven approach • Adopting a strengths-based approach • Engendering hope
Realistic appraisal of reality	• Concern for persons in their lived reality • Realistic appraisal of reality
Document/record keeping	• Value of record keeping and documentation • Written legacy for use by others
Teams	• Well-informed • Communicates regularly • Draws on companions' experience • Draws on collective wisdom in process of decision-making

Table 14. Features from Ignatian heritage for Way of Proceeding

Human spirit	• Heroic ambition • Pilgrim approach • Felt knowledge • Treating each person as an individual • Using gifts and talents for the greater good • Attending to deepest desires • Discerning our meaning and purpose • Collaborating in God's work • Stepping away from an ego-driven approach • Understanding our interconnectedness with all creation • Recognising the interdependence of all peoples in one common heritage • Being available and mobile for our mission
Practice framework	• Ongoing engagement with the poor. • Concern for persons in their lived reality • Love, service and liberating people from suffering is God's work. • Life-affirming, strengths-based approach • Walking with people as the possibilities unfold • Relationship-based interventions • Reciprocity and mutuality in relationships • Fostering healthy relationships and healing broken bonds • Tailoring response according to the person's needs • Addressing deep concerns and longings • Engendering hope • Helping the person to become free • Transformation of the person's heart • Developing institutional responses to address need • Working for structural change • Drawing others in to support the work • Prioritising action over words • Acting with love
Business processes	• Ensuring sustainability • Practising collaborative leadership • Setting the broad agenda and then trusting others to execute this • Requires good communication – for strategic purposes and care of people

	• Requires discernment – at all levels of the organisation • Value of written legacy for use by others • Value of record keeping and documentation

In Chapter 7, I distil these features, along with the findings from the following section on Jesuit heritage, which feed into the model I present.

Jesuit Heritage

The key documents from the Society of Jesus that I will consider in identifying elements pertinent to my research aim are the 'Formula of the Institute of the Society of Jesus' (Ignatius of Loyola, 1540/1996d, 1550/1996e); the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c); relevant correspondence from Ignatius (Ignatius of Loyola, 1553/1996a, 1546/1996b); and key documents from General Congregations of the Society of Jesus and of the Social Justice and Ecology Secretariat (SJES). While these documents were written for Jesuits, they have great relevance for those working with Jesuits or in Jesuit organisations as they provide insight into the application of Ignatian spirituality and Jesuit heritage at the organisational level, including the social apostolate. I also include commentary from leading historians of the Society of Jesus.

The Formula of the Institute

The 'Formula of the Institute of the Society of Jesus' (Ignatius of Loyola, 1540/1996d), outlined the activities of particular relevance to the social apostolate by which the Society would achieve its purpose. It described the commitment of Ignatius and the first companions to 'spiritual exercises and works of charity' (p. 3, n. 1). Drawing on the companions' experience over the previous ten years, the Formula of 1550 articulated an expanded number of works of mercy that Jesuits should undertake (O'Malley, 2013). These are 'to reconcile the estranged, compassionately assist and serve those who are in prisons or hospitals, and indeed any other works of charity' (Ignatius of Loyola, 1550/1996e, p. 4, n. 1). According to O'Malley (1993), Nadal's understanding that 'the Jesuits were fundamentally engaged in a "ministry of reconciliation"' and that this was important 'for understanding the other ministries and their strongly social character' (p. 169) points to an approach that prioritises relationship. The fact that the Jesuits revised their foundational document highlights an important feature of the Jesuit approach: reflecting on what experience is teaching us and being willing to update things accordingly.

The Formula specified that Jesuits are to be at the service of the universal Church. This charism of being universal, available and mobile is 'rooted in [Jesuit] tradition' (Kolvenbach, 2000b, p. 55) and was revolutionary for its time. It pointed to a global perspective, and a freedom and willingness to take on new works if deemed important. Additionally, the use of the term 'the common good' (Ignatius of Loyola, 1550/1996e, p. 4, n. 1) reflects a concern for the world beyond the religious domain, and points to the need for engagement with the world and its problems. In practice, the Jesuits developed institutional responses to tackle social problems (O'Malley, 2013) and to address structural injustice (Alvarez de los Mozos, 2019). This underlines the importance of being willing to work at different levels – individual through to institutional – depending on what the need is and how it can best be addressed. In the Formula, Ignatius made a number of qualifying statements allowing Jesuits to make decisions based on their own circumstances. This highlights the value of a non-prescriptive approach and readiness to respond and adapt to emerging needs.

The Constitutions of the Society of Jesus

In 1550, the same year that the revised Formula was approved by the Pope, the first draft of the 'Constitutions of the Society of Jesus' (Ignatius of Loyola, n.d./1996c) was ready for consideration by the first companions (Baumann, 2017). Ignatius understood the foundational role of love in any endeavour. In the Constitutions, where he set out detailed directions for the Society, Ignatius preceded these instructions by making a statement in the Preamble about the importance of love. He wrote that 'more than any exterior constitution, the interior law of charity and love' (Ignatius of Loyola, n.d./1996c, p. 56, n. 134) would help the Jesuits to fulfil their mission. As in the Formula, the Constitutions also highlighted the universal nature of the Society and the need for its members to be available and mobile for service (Ignatius of Loyola, n.d./1996c, p. 114, n. 258). This further underlines the importance of taking a global perspective when looking at problems and how to address them. It also highlights the importance of discernment and being free from disordered attachments in order to fulfil the stipulation in the Constitutions for availability and mobility. This extends beyond physical mobility and the willingness to go to new places; it includes an openness to reconsider commitments and to change direction if necessary.

The Constitutions consist of ten sections, addressing matters that are central to the governance and operations of the Society. Part VII, 'The Mission and Ministries of the

Society' (Ignatius of Loyola, n.d./1996c, pp. 276–298, n. 603–654), is the section that is of most direct relevance to the social apostolate, although other sections relating to matters such as governance and recruitment and formation of people are also pertinent. In Part VII, the fundamentals of having a universal perspective, of being available and mobile for the purposes of the mission, and striving for the *magis* are reinforced, with Jesuits being exhorted to keep the 'greater service of God and the more universal good before one's eyes as the guiding norm' (Ignatius of Loyola, n.d./1996c, p. 284, n. 622).

The central theme of the need for discernment when choosing between numerous *good* things is particularly evident in the 'Norms for the Choice of Ministry' (Ignatius of Loyola, n.d./1996c, pp. 284–288, n. 622–623). The Norms assess needs that are 'more urgent' (p. 286, n. 623) and prioritise situations where there is 'greater need' (p. 284, n. 622); where there is 'wretchedness and infirmity of the people there' (p. 284, n. 622); where there is a 'lack of other workers' (p. 284, n. 622) or where problems are 'without anyone else to attend to them' (p. 288, n. 623); where 'greater fruit is likely to be reaped' (p. 284, n. 622); where there is 'a better disposition and readiness among the people to be profited' (p. 284, n. 622); where 'the more universal the good is' (p. 286, n. 622), or where 'persons and places which, once benefited themselves, are a cause of extending the good to many others' (p. 286, n. 622); and where there will be 'spiritual' and 'corporal benefits' (p. 286, n. 623). In this tradition, it is therefore important to focus on problems or places where others will not or cannot go; refrain from imposing solutions on people; prioritise the *universal good* by ensuring interventions are sustainable and have more extensive and long-term benefits; and build capacity of those assisted and provide opportunities for them to assist others.

Further, these guidelines encourage us to weigh matters carefully before jumping to solutions or new areas of activity and to take into account the individual and particular circumstances of the context and person being engaged. They are not simply a useful set of criteria or framework for decision-making. They flow directly from the roots of the Society of Jesus, helping to ensure the Jesuit identity of a work or organisation seeking to operate in this tradition. They orient us in a particular direction that is often countercultural, directing us to align the organisation's decisions with its deeper purpose, rather than prioritise factors like its own growth without due consideration of the impact of interventions on those most affected.

Letters and Documents of Ignatius

There are nearly 7,000 letters or documents written by Ignatius or under his direction that are still in existence (O'Malley, 1993). In reflecting on a short collection of his correspondence compiled in *Personal Writings* (Ignatius of Loyola, 1996f), a few points stand out to me: Ignatius's prioritisation of correspondence and communication, which fostered the unity of the new Order; his willingness to delegate responsibility for a considerable portion of this; and his use of correspondence to reinforce central tenets of the Jesuit approach.

The Constitutions explain the importance and purpose of regular correspondence (Ignatius of Loyola, n.d./1996c, p. 326, n. 672–676). This includes mutual sharing of intelligence for strategic purposes such as planning initiatives and placement of personnel, and to inspire others in the mission and garner support for it. Prior to the Constitutions being finalised, letters provided a way of governing the Society. Ignatius did not use correspondence for strategic purposes only, however. The purpose of many of his letters was to demonstrate care of the person, captured in the now familiar term *cura personalis*, first used in the twentieth century to describe 'the responsibility … to care for each man in the community with his unique gifts, challenges, needs, and possibilities' (Howell, 2017b, p. 214). The various purposes of Ignatius's correspondence underline the need for reciprocity in communication for both strategic and pastoral reasons.

Ignatius was willing to delegate responsibility. He was greatly assisted by Juan Alfonso de Polanco (his secretary between 1547–1556), who managed the extensive and steady flow of correspondence, and by Jerome Nadal, who relayed messages as he travelled extensively across Europe. Nadal often guided Jesuits on how to translate the spirit of the Society into daily reality (O'Malley, 1993). The latter highlights the importance of ensuring fidelity to an agreed model.

Another lesson from Ignatius's letters is his instruction to Jesuits about being prepared to engage with centres of power if deemed appropriate, as evidenced in his letter to Fr Diego Mirón in Lisbon regarding his relationship with the King of Portugal (Ignatius of Loyola, 1553/1996a). Ignatius also instructed Jesuits how to engage with power. For instance, in his letter to the fathers attending the Council of Trent (Ignatius of Loyola, 1546/1996b), he called for them to be dispassionate, humble and 'slow to speak' (p. 164, n. 2). It is noteworthy that while giving his companions directions on how to behave, he continued to encourage a flexible response based on their experience and judgement at the time (Ignatius of Loyola, 1546/1996b). This reinforces the importance

of discerning what action to take within any context. Ignatius also urged the fathers at the Council of Trent to continue their service to the poor, and to be attentive and ready to adapt to others' needs (Ignatius of Loyola, 1546/1996b). This underlines the importance of remaining grounded with the poor whatever other significant tasks for which we have responsibility.

General Congregations

In Chapter 3, where I provided a brief overview of the history of the Society of Jesus, I noted the significance of the period following the promulgation of Pope Leo XIII's (1891/1931) encyclical *Rerum Novarum*. That era is understood to be when the 'Church's traditional presence and action among the poor took a decisive turn' (Czerny & Foglizzo, 2000, p. 7). It was in that context that the Jesuits' commitment to social justice, in contemporary form, emerged and developed. Part of this evolution is reflected in the documents from *General Congregation 24* (Society of Jesus, 1892/1994a) to *General Congregation 31* (1967/2009a). In reviewing documents from General Congregations leading up to General Congregation 32 in 1975, it is evident to me that the social dimension of the Society of Jesus was being awakened in line with happenings in broader society. These documents demonstrate a growing understanding of the structural causes of injustice and an exploration of methods to address these, alongside a commitment to assisting those in dire need.

General Congregation 32 is widely acknowledged as the critical point when the Society recast its mission in line with the Church's social teaching and the original charism of the Society. Through Decree 4, 'Our Mission Today: The Service of Faith and the Promotion of Justice' (Society of Jesus, 1975/2009b, pp. 298–316), the Society was re-founded, giving its work in the social sector 'new emphasis and direction' (Campbell-Johnson, 1997, p. 12). General Congregation 32 strengthened the social apostolate and named the promotion of justice as a concern of the whole Society, not just a few Jesuits. *General Congregation 32* (Society of Jesus, 1975/2009b) drew on the example of Ignatius and the first companions in calling the Society to examine the current reality, renew its mission, and adapt 'to the new needs of the times and to a world in process of rapid change' (p. 299, d. 4, n. 9). This call is perennial, underlining the importance today of reading the signs of the times and adapting our interventions to current needs. *General Congregation 32* also emphasised an understanding of the structural causes of injustice, highlighting the need for 'the most rigorous possible political and social analysis of our

situation' (Society of Jesus, 1975/2009b, p. 308, d. 4, n. 44). Nevertheless, the focus on the development of the whole person, particularly the spiritual dimension and its relationship to injustice, remained of primary concern: 'Injustice must be attacked at its roots which are in the human heart by transforming those attitudes and habits which beget injustice and foster the structures of oppression' (Society of Jesus, 1975/2009b, p. 306, d. 4, n. 32). The Congregation emphasised the need for high-quality people with 'well-trained minds and dedicated spirits' (Society of Jesus, 1975/2009b p. 295, d. 2, n. 25) and a solid, informed analysis that draws on a wide range of disciplines and acknowledges the complexity, interconnectedness and global nature of problems. This is considered the basis for skilled intervention at various levels – from personal and communal through to structural. Importantly, addressing structural injustice involves fostering processes that encourage everyone to participate, to engage as citizens, to use their skills and to take responsibility for all areas of community life. This underlines the importance of our having a clear line of sight from the micro to the macro levels of intervention.

Given the profound re-casting of the Society's mission in General Congregation 32 and the inevitable tensions that ensued (Bisson, 2014), General Congregation 33 is significant because of its confirmation of that direction. *General Congregation 33* (Society of Jesus, 1983/2009c) named the destruction of the environment as a concern of the Society, which was reinforced in *General Congregation 34* (Society of Jesus, 1995/2009d). *General Congregation 34* put forward an expanded view of justice, beyond social and economic factors, reflecting a growing understanding of our interconnectedness, of 'the interdependence of all peoples in one common heritage' (Society of Jesus, 1995/2009d, p. 531, d. 3, n. 7). This, in turn, led to an appreciation of the full range of human rights where we are called to value and foster relationships with each other, broader society, culture and the natural environment.

The Jesuits' experience and reflection had led to a growing understanding of the importance of fostering participation, community connection and strengthening civil society, as a means for bringing about social change:

> Social change does not consist only in the transformation of economic and political structures, for these structures are themselves rooted in socio-cultural values and attitudes. Full human liberation, for the poor and for us all, lies in the development of communities of solidarity at the grass roots and

> nongovernmental as well as the political level, where we can all work together towards total human development. (Society of Jesus, 1995/2009d, p. 532, d. 3, n. 10)

This reinforces the need to work at numerous levels, providing depth and breadth to our work. It highlights the need to have a clear understanding of our purpose and what we are trying to achieve. The emphasis on participation extended to the relationship between the Jesuits and the laity in Decree 13, 'Cooperation with the Laity in Mission' (Society of Jesus, 1995/2009d, pp. 608–615), and relationships with women in Decree 14, 'Jesuits and the Situation of Women in the Church and Civil Society' (pp. 615–619). These Decrees orient the social apostolate, and the broader Society, towards inclusivity that is a necessity in the work of social justice, let alone a requisite of Christianity.

General Congregation 35 in 2008 provided 'further nuances' (Alvarez de los Mozos, 2019, p. 206) to the theme of the promotion of justice. *General Congregation 35* (Society of Jesus, 2008/2009e) highlighted the idea of collective work toward a common purpose, referring to 'Many Sparks, One Fire' (pp. 733, d. 2) and 'unity-in-multiplicity' (p. 733, d. 2, n. 2). It reinforced the need for ongoing examination of our experience and context to identify 'new frontiers' (p. 741, d. 2), where we should go, and to address the attitudes and beliefs that drive all forms of injustice. Ecology was central to the Jesuits' understanding of their mission and prioritised beyond being simply another issue of concern. Decree 3, 'Challenges to Our Mission Today' (Society of Jesus, 2008/2009c, pp. 744–754), spelled out the call to be in right relationship with God, with others, and with creation (see pp. 745–752, d. 3, n. 12–36), putting an elevated focus on reconciliation as a unifying principle, inclusive of our approach to the natural world. At General Congregation 35, the name of the Social Justice Secretariat was changed to Social Justice and Ecology Secretariat to reflect this expanded understanding of justice.

General Congregation 36, in 2016, was integral in confirming the order's purpose in terms of reconciliation – with God, neighbour, and creation. It reinforced Pope Francis's Encyclical published in 2015, *Laudato Si'*, which criticised the dominant economic paradigm for its disregard and degradation of people and the environment. Decree 2 of *General Congregation 36*, 'Renewed Governance for a Renewed Mission' (Society of Jesus, 2016/2017, pp. 22–29), identified three processes as critically important to a contemporary way of proceeding: discernment, collaboration and networking.

The documents of the General Congregations, along with the foundational documents of the Society, are directed to the whole Society. They provide a wealth of material to inform the identity of a community service organisation operating with a Jesuit identity. I now turn my attention to key documents published by the Social Justice and Ecology Secretariat and other documents directly concerning the social apostolate.

Social Justice and Ecology Secretariat and the Social Apostolate

In reflectively reviewing these documents, it is possible to detect not only features that speak to the Jesuit identity of a community service organisation, but also material that relates to the challenge I identified earlier regarding the Jesuits' implementation of their mission to promote justice.

The fruit of an international seminar held in Rome in 1980, The Social Apostolate in the Society Today, attended by Superior General Fr Arrupe, saw the identification of seven characteristics of a social institute that are pertinent today (Campbell-Johnston, 1997). These confirm that work done in line with Jesuit heritage promotes justice and is done in solidarity with the poor; seeks changes in structures that are unjust and builds new structures based on people's participation; ensures interventions are based on rigorous analysis of structures, context, events and trends; operates from a Christian perspective; works in partnership with like-minded people and engages with those who take different approaches; and aligns with the Church and the Society (Campbell-Johnston, 1997).

Soon after General Congregation 34, members of the social apostolate, together with Fr Kolvenbach, gathered in Naples in 1997. The publication *Characteristics of the Social Apostolate* (Social Apostolate Secretariat, 1998) followed. Its goal was to mirror what the education apostolate had done in producing its 'Characteristics of Jesuit Education' (International Commission on the Apostolate of Jesuit Education, 1986). The social apostolate, in a formal sense, was much newer, less structured and more diverse than the education sector, and did not lend itself to close definition. The document that emerged reflects the challenge of corralling the diverse suite of offerings that characterise the social apostolate into a shape that can be examined for its essential elements. While the framing of social analysis – including socio-cultural, economic, political and religious dimensions – is a useful paradigm for understanding injustice, the document does not in provide clear guidance for operationalising the commitment to justice. Interestingly, it does not address Jesuit social centres explicitly.

In his letter, *On the Social Apostolate*, Fr Kolvenbach exhorts the Jesuits to address economic, political, cultural and religious structures of oppression, and urges them to pay 'unflagging attention to the different aspects of the contexts in which we find ourselves' (Kolvenbach, 2000a, p. 24), underlining the tailored approach that should characterise interventions. Fr Kolvenbach acknowledged that since General Congregation 32, the social dimension of the mission had been taken up well across the various sectors of the Society. While noting that the social apostolate provided visibility to the social dimension through its various works, he lamented the internal and external factors that had rendered the social apostolate weak, including the dwindling number of Jesuits (Kolvenbach, 2000a, p. 23); discouragement, disorganisation and insularity in the social sector; and an environment marked by rapid social change. He warned that if this continued, the social dimension would disappear. Others in the social apostolate have also rung this warning bell (Alvarez de los Mozos, 2019).

In 2005, the secretariat published a document titled *Jesuit Social Centres: Structuring the Social Apostolate*, which identified the types of activity suitable for social centres to undertake: research ('analysis, monitoring and reflection activities'); formation ('training activities addressed to specific groups such as social workers [and] activists'); and social action (which 'aims through concrete actions at transforming the structural situation of the people') (Social Justice Secretariat, 2005, p. 10). In the preface to that document, Fr Kolvenbach declared support for a more structured, formal approach to the social apostolate, writing that Jesuit social centres 'can become effective instruments to structure and render visible the Social Apostolate' (p. iv). This view is complemented by Michael Czerny SJ (2008), former leader of the secretariat (1992–2002). He wrote that 'enormous pluralism in the social apostolate' (p. 30) has always been accepted, along with diffuse governance arrangements, although he raised the question of whether this has led to a less effective apostolate overall. Also in 2005, in a further attempt to scope and structure the work of the social apostolate, an international group of social coordinators published a document naming 'dimensions that are essential for the promotion of justice' (Social Coordinators of the Conferences, 2015, p. 27). These are relevant to the work of a community service organisation and are as follows: accompaniment, service, research/reflection, consciousness-raising, and transformation of structures.

Through *We Live in a Broken World* (Social Apostolate Secretariat, 1999) and, in collaboration with the Higher Education Secretariat, *Healing a Broken World* (Task force

on Ecology, 2011), the secretariat provided leadership in helping the Society to extend its understanding of justice to encompass environmental issues. The focus on the interconnection between environmental and social injustice was reinforced, underlining the importance of taking a holistic approach to justice endeavours.

Reflecting on the above documents related to the social apostolate, I note their value as informative and inspirational guides. What is lacking, however, is the articulation of a clear strategy and practical recommendations to strengthen the social mission of the Society, specifically within the social apostolate. This non-prescriptive approach is understandable to some extent, given the global remit of the Society and the importance of tailoring responses to local circumstances; but it does little to progress the Society's expressed commitment to address need and promote justice. Upon reviewing this literature, I observed a disconnect between the central mission of the promotion of justice and the lack of structure to achieve it. It resonates with my personal experience that the social apostolate is weak in many places around the world, and arguably becoming weaker. I believe that the establishment of robust organisations, which endure beyond the commitment, interest and availability of individual Jesuits, provides a way forward. This requires the articulation of a clear model for fostering the Jesuit identity of such organisations to ensure fidelity to the Jesuit ethos as this work is shared with increasing numbers of committed lay people, and to give confidence to the Jesuits that this work is truly Jesuit in nature.

Summary of Findings: Jesuit Heritage

My review of Jesuit heritage revealed a wealth of material relevant to the Jesuit identity of a community service organisation. In concluding this section, I now provide a comprehensive list of features that speak to that identity, drawn directly from the reflective review presented above. In Table 15, I present the features that align with the seven elements that I currently use in the course of my work. The process demonstrates strong support for, and enhances, the existing elements. In Table 16, I present a number of additional themes and features I identified in the reflective review of Jesuit heritage. I will draw on these in Chapter 7 when I finalise the updated list of elements that speak to Jesuit identity. In Table 17, I present the features I identified that relate to the Way of Proceeding and its three domains.

Table 15. Features from Jesuit heritage for elements

Gratitude	• Appreciating gift of everything • Appreciating the relational nature of everything • Gratitude for partners' contributions
Relationship	• Valuing and fostering relationships with each other, broader society, culture and the natural environment • Entering into the right relationship with God, others and creation • Practising *Cura personalis*
Doing	• Engaging with people on the margins • Responding to needs • Developing the whole person • Taking account of circumstances of context and person • Fostering engagement as citizens • Fidelity to an agreed model • Developing institutional responses to tackle social problems
Influencing	• Rigorous political and social analysis • Addressing structural injustice • Addressing attitudes and beliefs • Engaging centres of power • Research, formation, social action • Reconciliation as a unifying principle • Reconciliation with natural world • Building justice and charity into the structures of human life in common
Discernment	• Reflecting on what experience is teaching us • Identifying areas of need in the contemporary context • Reading the signs of the times • Freedom from disordered attachments • Adapting to current needs • Availability and mobility • Discern when choosing between good things • Weigh matters carefully • Discern what action to take in any context • Align decisions with deeper purpose
Magis	• Freedom and willingness to take on new works • Flexibility, adaptability, availability and mobility • A non-prescriptive approach • Readiness to respond, adapt, go to new places • Openness to reconsideration of commitments, to a change of direction • Universal perspective • Striving for the greater good • Examination of experience and context to identify and go to new frontiers
Contemplatives in action	• Foster personal attributes to live out the mission • Attend to deepest desires • Practise *Cura personalis* • Practise reciprocity in communication for both strategic and pastoral reasons, and to foster unity • Are high-quality people • Are intellectually equipped • Are well trained

	• Are attuned to God's presence and action in the world

Table 16. Features from Jesuit heritage for additional elements

Love	• Foundational role of love in any endeavour • Interior law of charity and love
Oneness	• Interdependence of all peoples in one common heritage • Reconciliation – with God, neighbour, creation
Universality	• Global perspective • Universal nature • Complexity, interconnectedness, and global nature of problems – social and environmental • Elevated focus on reconciliation as a unifying principle, inclusive of our approach to the natural world
Generosity	• Engaged • Life-giving • Available
Solidarity	• Appreciating relational nature of everything • Promoting justice in solidarity with the poor • Fostering engagement as citizens • Addressing structural injustice • Building communities of solidarity • Building justice and charity into the structures of human life in common
Realistic appraisal of reality	• Engagement with the world in its reality • Concern for people in their lived reality • Honest appraisal of any situation
Availability/mobility	• Universal, available and mobile • Working together for a common purpose
Document/record keeping	• Extensive steady flow of correspondence • Fidelity to agreed model • Reciprocity in communication for strategic and pastoral reasons
Teams	• Should be led by the principle of *cura personalis* • Should show care for each person in the community • Should practise reciprocity in communication for both strategic and pastoral reasons • Should keep people well-informed and communicate regularly

Table 17. Features from Jesuit heritage for Way of Proceeding

Human spirit	• Attending to people's deepest desires • Fostering personal attributes to live out the mission • Practising *cura personalis*
Practice framework	• Engaging with people on the margins • Engaging with the world in its reality • Responding to needs • Adapting interventions to current needs

	• Taking a non-prescriptive approach • Undertaking skilled intervention at various levels • Developing the whole person • Engaging as citizens • Using skills and taking responsibility for all areas of community life • Participating in transformation • Using institutional responses to tackle social problems • Working at different levels • Valuing knowledge from a wide range of disciplines • Deploying rigorous interventions • Being faithful to an agreed model • Addressing structural injustice • Conducting rigorous political and social analysis • Reading the signs of the times • Engaging with centres of power • Valuing and fostering relationships with each other, broader society, culture and the natural environment • Encouraging participation and community connection, and strengthening civil society to bring about social change • Building communities of solidarity • Reconciliation – with God, neighbour, creation • Discernment in collaborations networking • Promoting justice in solidarity with the poor • Building new structures based on people's participation • Working in partnership with like-minded people • Engaging those who take different approaches • Operating from a Christian perspective • Operating in alignment with the Church and the Society
Business processes	• Global perspective in type of interventions, governance and service structure • Freedom and willingness to take on new works • Trust and willingness to delegate responsibility • Sustainable interventions • Reciprocity in communication for both strategic and pastoral reasons

Conclusion

My reflective review of Ignatian and Jesuit heritage highlights the centrality of the promotion of justice for those walking in this tradition. It demonstrates that the heritage is replete with inspiring words and calls for action, suggesting the potential of the Jesuits to make a significant contribution to building a more just world. This draws attention to the gap between the promise and the lived reality, in part due to the lack of a more structured social apostolate and robust organisations that can operationalise this commitment in a sustainable way. The review identifies numerous features that speak to the Jesuit identity of a community service organisation. These findings, along with those from my autoethnography, feed directly into Chapter 7, where they will be further distilled, ultimately contributing to the organisational identity model I present.

CHAPTER 7

Action

In the Ignatian Pedagogical Paradigm, it is understood that experience that is reflected upon should lead to action. In keeping with this, my research process has been leading to this point where I act to synthesise and then present my experience and reflections in a way that can be operationalised in the world. These findings have emerged in the process of deliberating on the operating context and the knowledge context; my experience as presented in my autoethnography; and a reflective review of Ignatian and Jesuit heritage. I note that while I present many of my findings in relation to Jesuit Social Services, they have broader application across the Jesuit enterprise and beyond. My primary research aim is to articulate a model for fostering the Jesuit identity of a community service organisation in a contemporary context. As previously identified, the secondary research aim that sits beneath this, and which must first be addressed, is to identify the elements and features from Jesuit heritage that speak to Jesuit identity of a community service organisation.

In this chapter, I first address this secondary aim. I do this by bringing together the insights that emerged from Chapter 5 and Chapter 6. In the course of my work at Jesuit Social Services, I had intuited and then applied a framework of ethical action drawn from my life experience and from my engagement with Ignatian and Jesuit heritage. I have termed this my existing knowledge. It is composed of the seven elements of *gratitude*; *relationship*; *doing*; *influencing*; *magis*; *discernment*; and *contemplatives in action* and the Way of Proceeding framework comprising three domains: Human Spirit; Practice Framework; and Business Processes. In Chapter 5, I re-visited my biography to trace the origins of that existing knowledge and identify additional experiential knowledge that I would draw on to foster the Jesuit identity of Jesuit Social Services. In the Conclusion to Chapter 5, I presented a summary of this knowledge (Tables 9–11). In Chapter 6, I presented findings from both Ignatian and Jesuit heritage that, I argue, can be used to operationalise the Jesuit identity within a community service context (Tables 12–14 and 15–17).

In the current chapter, I refine the experiential and Ignatian/Jesuit knowledge presented in Chapters 5 and 6 through critically reflecting on the themes that emerged from my analysis. I propose an updated list of elements and associated features that speak to Jesuit identity, and I identity numerous features that can be applied to the Way

of Proceeding framework to foster Jesuit identity. In so doing, I explore the relationship between the powerful tools I currently use to foster Jesuit identity to demonstrate how they can be synthesised for the purpose of strengthening my model: 1) the elements distilled from Jesuit heritage that express Jesuit identity, 2) the Way of Proceeding framework, 3) the *one foot raised* image, and 4) the tree image. This chapter introduces what I call the 'LOGoS Tree Model', which brings together all four of these tools in a revised model that incorporates insights gained from the process of critical reflection on my personal data and Ignatian and Jesuit heritage. I chose the name 'LOGoS' for two reasons: it references the Greek 'logos' as a principle that gives order, and that allows us to understand, while the letters provide a link to the updated list of elements I identify (as will be explained later in the chapter). The LOGoS Tree Model brings together the numerous insights and experiences emanating from the research, giving order to them, explicating the nature of Jesuit identity and its application to a community service organisation, and shedding light on the ontology and epistemology of organisational identity. After introducing the tree model, I then articulate a schema that provides a narrative about the interrelationship of the various components represented in it. Finally, I consider how aspects of the LOGoS Tree Model could be applied in settings outside Jesuit Social Services, including other community service organisations.

The Elements

The summaries of the features that emerged from the three sources of knowledge – personal, Ignatian and Jesuit – were presented in tables in Chapter 5 (Tables 9–11) and in Chapter 6 (Tables 12–14; Tables 15–17). In considering this material together, it is clear that there is strong support for the seven existing elements and for a number of additional themes, and that each of these is enriched by the reflective process. The identification of this wealth of features presented in those tables highlights some important points regarding my process of thematic analysis: I had intuited the seven elements over the course of my work in the dynamic environment of leading Jesuit Social Services. From this vantage point, I recognise that my treatment of this material had therefore often lacked depth. I had, at first, simply grouped the elements together as a collective expression of Jesuit identity. However, reflecting on them from my current position, I now see that they vary in nature, priority of order and relationship to each other. For example, the nature of *discernment*, as a process, is quite different from *doing*; and it is unclear how *gratitude* relates to the element of *relationship*, or how discernment and

magis work together. My new model and associated schema (which I present below) address this problem by differentiating between the elements and spelling out their interrelationship.

The elements, figures and models that I present in the current chapter are the culmination of the evolution of the reflective processes that constitute this thesis. My task here is act upon the knowledge that has emerged in the thesis to develop a working model to foster Jesuit identity in a community service organisation in a contemporary context. This chapter addresses my research aim by distilling the significant amount of scholarly, autobiographical and Ignatian/Jesuit material in order to *identify the elements and features from Jesuit heritage that speak to Jesuit identity of a community service organisation.*

To do this, I walked, thought, wrestled, prayed over, and sat with my analysis. I made indecipherable notes and sketches on scraps of paper; I tracked back, uncovering layer upon layer of insights and experience, going deeper and deeper, before crystallising my thoughts in relation to what has emerged from the material under consideration. This process prompted me to consider the following questions: What is my understanding of reality that provides the foundation for everything that follows? What is my response in light of this foundational understanding? Given my understanding of reality and my response, what then should be the deep purpose of an organisation aspiring to express its Jesuit identity? What is the mechanism to operationalise this purpose in the world? What is the approach that should be taken to enact this purpose? What key principle and process from the Jesuit tradition should guide the approach and activity of a community service organisation that gives expression to its Jesuit identity? In answering these questions, essential elements and key components of the model emerged. These are able to be applied directly to the LOGoS Tree Model, with their interrelationship being further elaborated on in the schema that I articulate.

The six elements that speak to Jesuit identity that I chose through this process are as follows: *love*, *oneness*, *gratitude* and *solidarity*, with *magis* and *discernment* forming a dynamic that supports the operationalisation of the first four elements.

1. ***Love*** is God's self freely given, the unifying mystery at the heart of life. Love is the deepest foundational element, at the heart of any endeavour. Love expresses itself in deeds more than words.

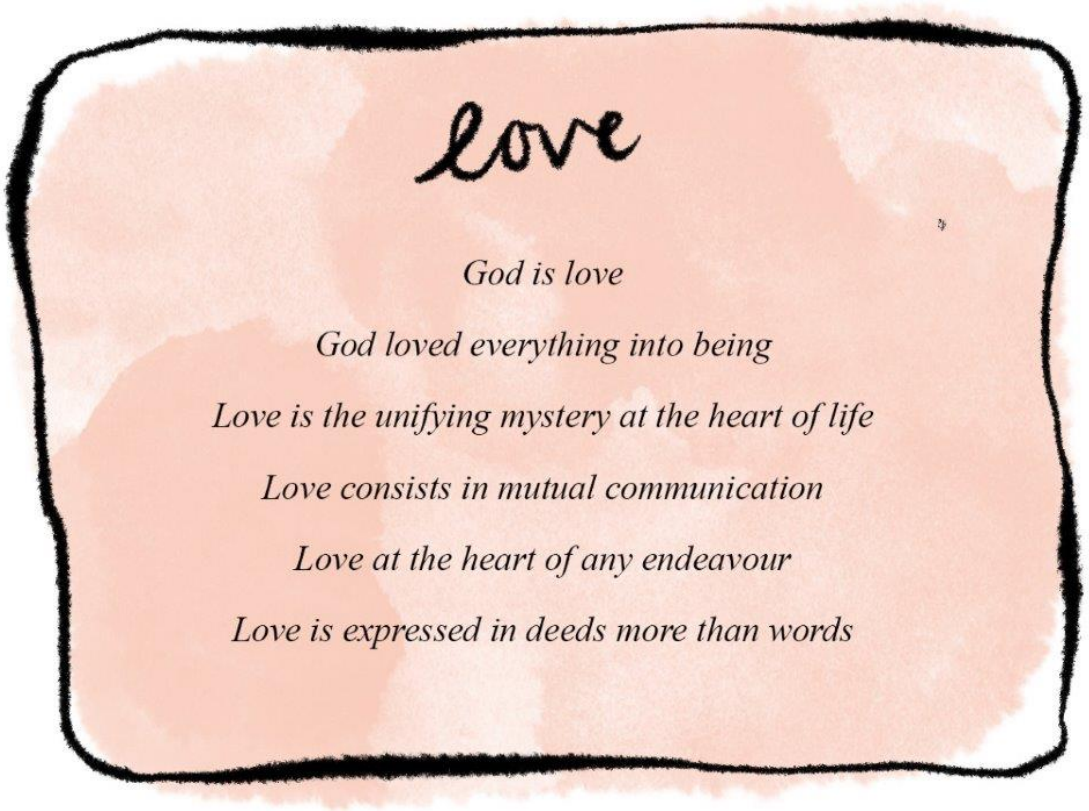


Figure 7.1 Features for Love

2. ***Oneness*** reflects the understanding that everything proceeds from and returns to God; God is present and labouring in all things; God's essence, our essence, the essence of everything, is relational. Oneness reflects the interconnectedness of everything, but goes beyond it to situate all these relationships as part of a whole. This element highlights the reality that we are all held, nourished and sustained in a web of relationships. This points to our organisational purpose of strengthening and healing relationships – across people, place and planet. Viewed in the light of oneness, relationship is understood as our essence more than an approach we adopt; it is a way of being, reciprocal, and the foundation for solidarity. Oneness points to the importance of adopting a universal, global perspective in understanding reality and injustice and solutions to this. It elevates the purpose of reconciliation with God, neighbour and creation.

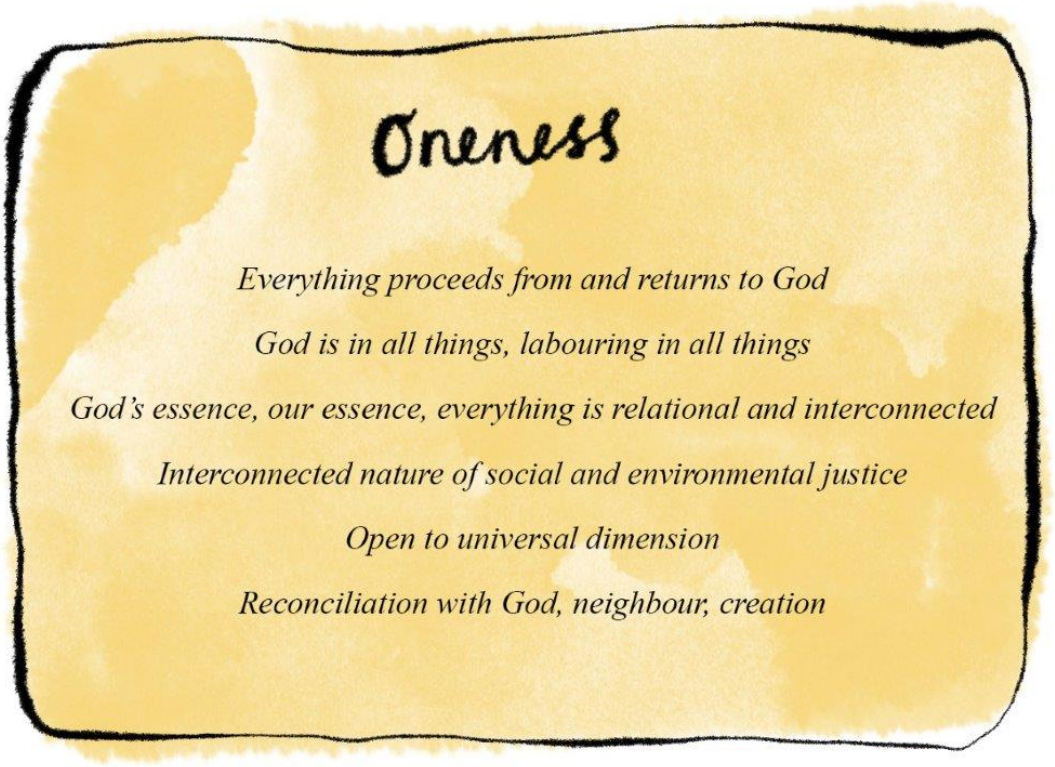


Figure 7.2 Features for Oneness

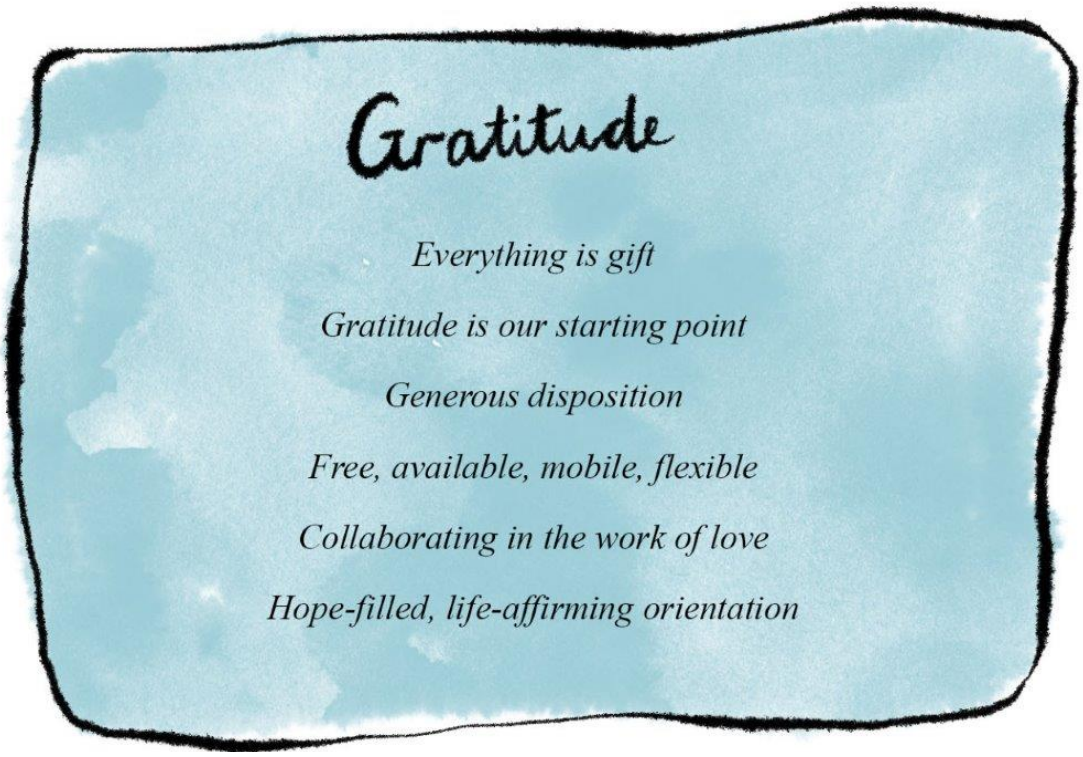


Figure 7.3 Features for Gratitude

3. ***Gratitude*** is our response to the reality that is spelled out in the above elements. Appreciating the fact that everything is gift orients our hearts towards generosity. It fosters the disposition to be free and available to respond to the invitation to collaborate with God in the work of love, healing and reconciliation – to take on new works, go to new places, to be flexible, nimble and adaptable. It provides a hope-filled starting point.

4. ***Solidarity*** is the expression of our love, oneness and gratitude enacted in the world. It characterises our approach across people, place and planet. It reflects that we are not the expert on another's life; rather, we stand shoulder to shoulder with people, accompanying them as the possibilities unfold. It challenges us to build communities of justice and solidarity where people participate, use their skills and take up their full role as citizens. It calls us to speak truth to power, to challenge unjust structures and to move hearts, minds, systems and structures towards love and justice. Solidarity is reflected in our approach to the natural environment where we give expression to our respect and interdependence.

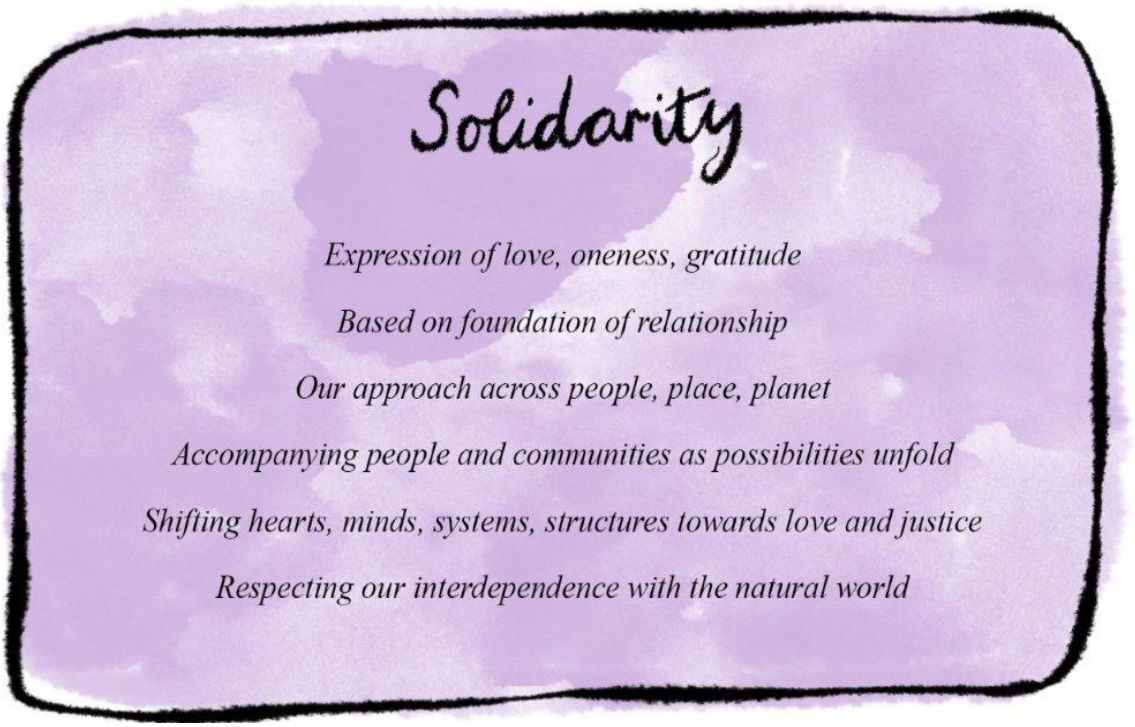


Figure 7.4 Features for Solidarity

5. ***Magis*** reflects our wholehearted desire for love and service and our understanding that we are called to be part of God's loving action in the world. In enacting our purpose, *magis* is our guiding principle – helping us to choose the option that is more loving, effective, and influential, meets the greatest need, and is the best among other good options and always seeks the greater good.

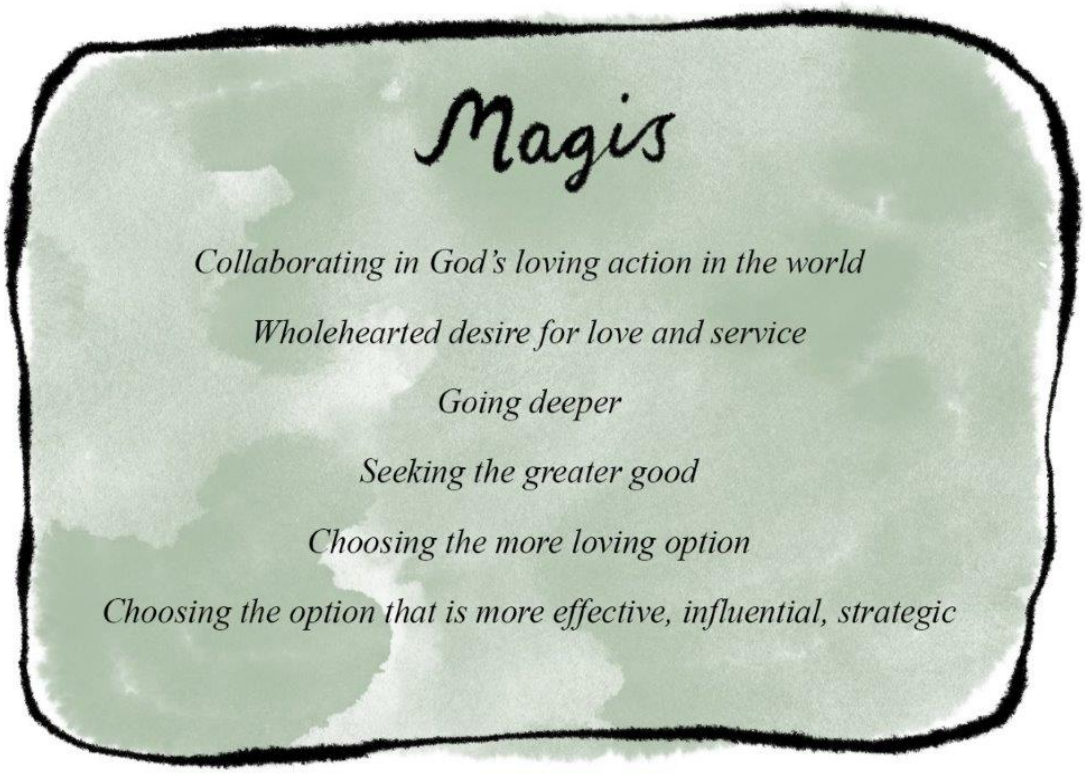


Figure 7.5 Features for *Magis*

6. ***Discernment*** is the process that supports our orientation towards the *magis*. It is an ongoing dynamic that permeates all activity, fostering our capacity to be free and available to live our Purpose. It involves making an honest appraisal of reality, reading the signs of the times and undertaking a rigorous analysis of any situation. It helps us unpack our motives and fosters freedom to make life-giving choices.

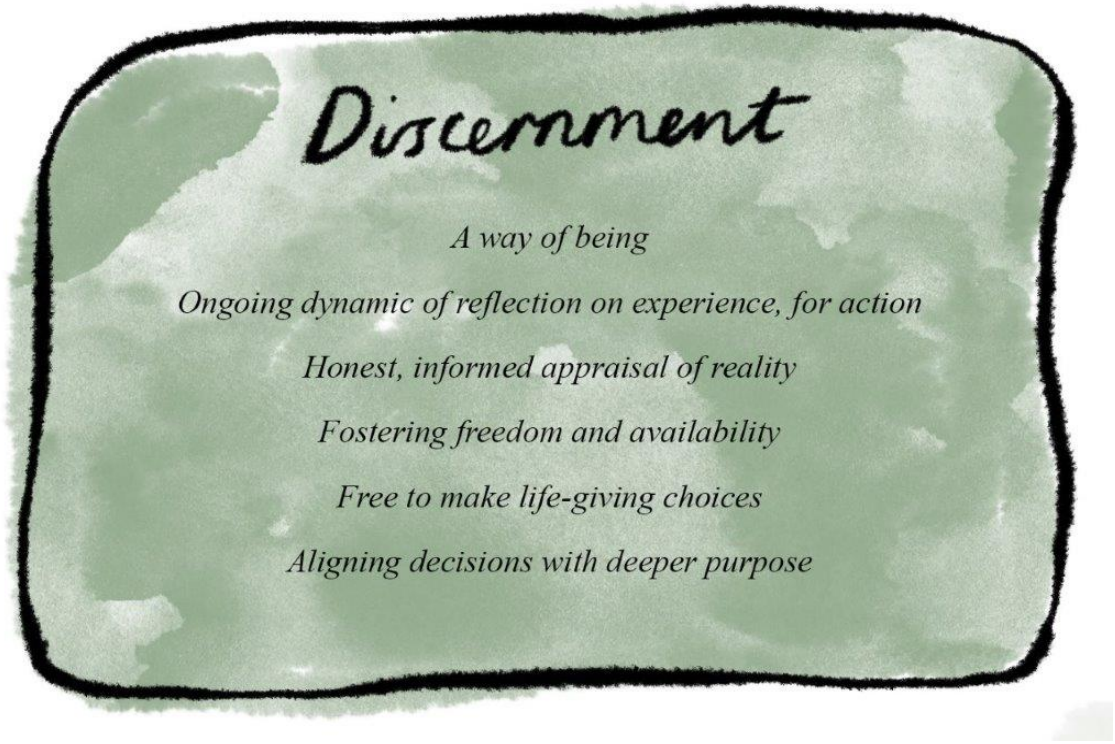


Figure 7.6 Features for Discernment

I note three of the former elements that remain: *gratitude*, *magis*, *discernment*. Three additional themes emerged as sufficiently distinct and significant to justify the creation of new elements: *love*, *oneness*, *solidarity*. The remaining four former elements are incorporated into the new elements (*relationship* in *oneness*) and into the Way of Proceeding domains (*doing* and *influencing* in the Practice Framework domain; *contemplatives in action* in the Human Spirit domain). Remaining themes are assigned to, and strengthen, elements or framework domains (for example, some features listed under *generosity* now enhance the element of *gratitude*, while others enrich the element of *magis*).

In undertaking this study, it was not my purpose to test Albert and Whetten's (1985) thesis that those attributes considered to be *central*, *distinctive* and *enduring* point to an organisation's identity. I acknowledge, however, that these criteria were useful to have in mind when I reviewed personal, Ignatian and Jesuit material; and now that I have determined the elements that speak to Jesuit identity, I believe that they meet Albert and Whetten's criteria. They are *central* in the sense that they are 'seen as the essence of the organization' (Albert &Whetten, 1985/2004, p. 90); distinctive in that they 'distinguish

the organization' (p. 91) from similar others; and enduring in demonstrating 'some degree of sameness or continuity over time' (p. 90).

The Way of Proceeding Framework

In looking to strengthen the Way of Proceeding framework and its three domains, I considered the summaries of the features presented in Tables 9–11 in Chapter 5, and Tables 12–17 in Chapter 6. Reflecting on these tables provided me with the opportunity to act to enhance the framework in a number of ways.

First, to address thematic overlap, I folded the features associated with the *contemplatives in action* element into the Human Spirit domain, and I incorporated the features associated with the former elements of *doing* and *influencing* into the Practice Framework domain.

Second, while the updated list of six elements applies to the whole framework, the elements can also be expressed in ways specific to each domain. For example, the element of *discernment* can be expressed in the Human Spirit domain (*discern meaning and purpose*; *regular practice of reflection*; *connection between inner and outer worlds*), in the Practice Framework (*make a realistic appraisal of reality*) and in Business Processes (*freedom and willingness to take on new works*).

Third, and most significantly, each domain is strengthened by applying the numerous features that emerged through the review of the three sources of knowledge. Reflecting on these, I grouped them under key headings that provide structure to the three domains. Within each domain, some features speak to an underlying understanding of reality in line with Jesuit identity, and some relate to the fundamentals of an approach consistent with this. Remaining features are clustered in themes relevant to the specific domains. It is also important to note that features related to environmental justice are included across all domains. In the final Act of my autoethnography I outlined how Jesuit Social Services expanded its understanding of social justice to embrace environmental justice. Ignatian and Jesuit sources support this direction, confirming it as a necessary aspect of Jesuit organisational identity. In the sections below, I present the three domains (Figures 7.7, 7.8, 7.9) and provide commentary on them, demonstrating how each has been strengthened by the identification of features from across the three sources of knowledge.

Human Spirit

The phrase that best captures the essence of the Human Spirit domain is *contemplatives in action*. This speaks to the dynamic of reflecting on experience for action. To date, when speaking about the human spirit with staff at Jesuit Social Services, the main point I have promoted is the idea that we bring our whole selves to this work, pointing to an interior essence that is unique to each of us. Bringing the self to the work highlights the importance of understanding our own purpose, values, strengths, weaknesses and motivations when we enter relationship with others. Self-awareness is predicated on personal reflection and reflective practice.

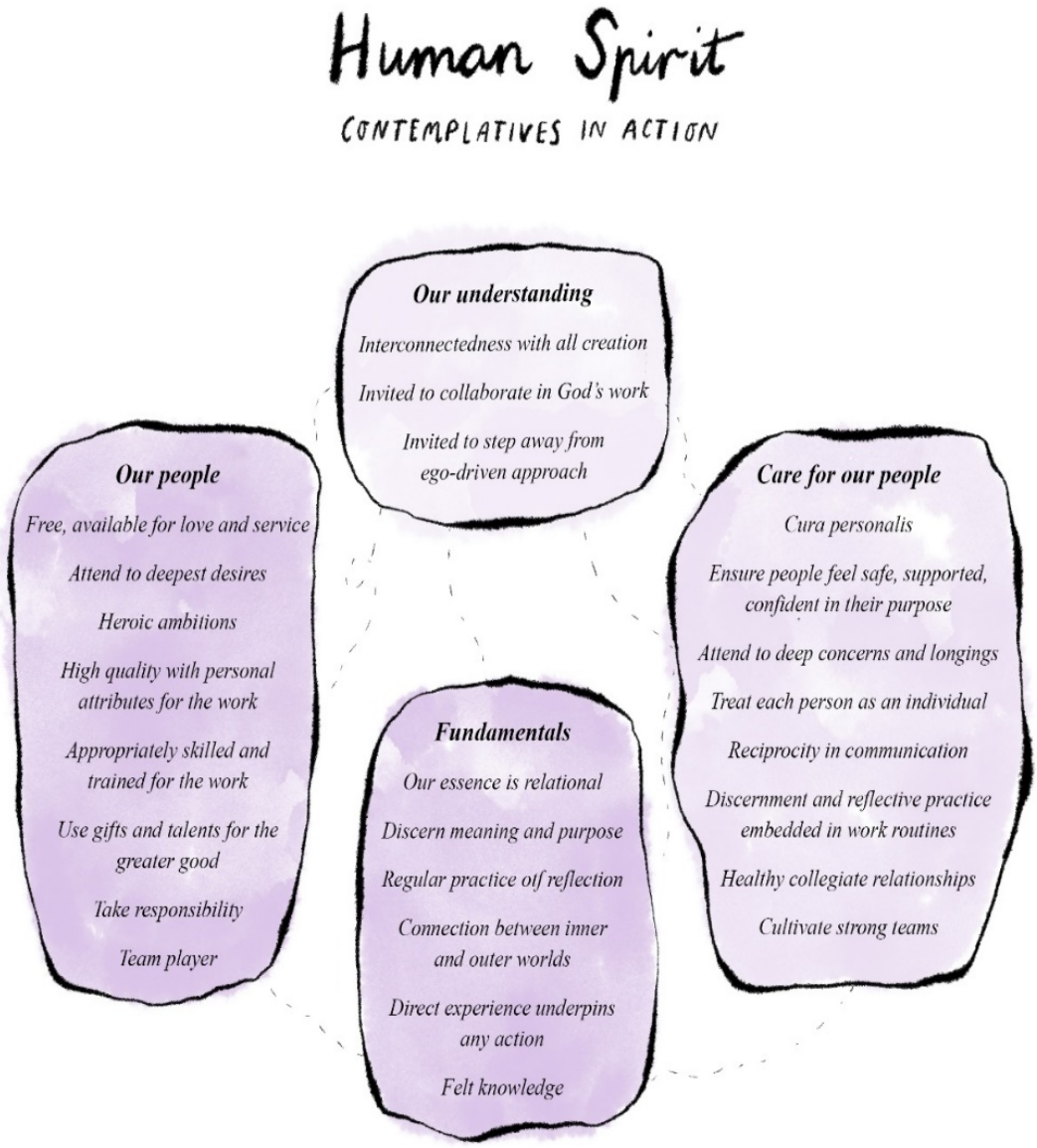


Figure 7.7 Human Spirit

Having examined the features identified in the personal, Ignatian and Jesuit sources, it is apparent that these support the approach I currently take to this domain and, in addition, provide further nuance. Beyond exploring the features that speak to our understanding of reality and to the fundamentals of an approach consistent with this, I identified features that speak to how these are given expression in our people and in how the organisation cares for its people. I draw attention to two key features that now strengthen this domain: basing our understanding of the human spirit on the foundation of interconnectedness; and ensuring we pay attention to staff's deepest desires, including their spiritual needs. Features related to the Human Spirit domain are presented in Figure 7.7.

Practice Framework

The words that best capture the essence of the Practice Framework domain are *doing* and *influencing*. These speak to the dynamic of being grounded in reality and addressing immediate need, while working to influence hearts, minds, systems and structures for love and justice. This domain, corresponding to the core work of Jesuit Social Services, covers a range of interventions appropriate to a community service organisation operating in the Jesuit tradition: service delivery; education, training and employment pathways; community engagement; and research, policy and advocacy. Given its centrality to Jesuit Social Services, it is understandable that the Practice Framework was the most developed of the domains. The process of reflecting on the material from the three sources of knowledge demonstrates strong support for, and further enhances, this domain.

Beyond identifying features that speak to our understanding of reality and to the fundamentals of an approach consistent with this, I identified features that indicate how these are given expression in our practice at the level of our engagement with the person, community, society and the environment. At the level of the person, a key feature that strengthens this domain is *attend to people's deepest desires*, including their spiritual needs. Reflecting on my personal material, I recognised that while it is certainly a feature of practice in particular programs, and of some practitioners, to date it has not been embedded strongly in our Practice Framework. There are a few reasons for this: the challenge we face in a secular society about how to approach this area of practice; understandable concern about over-reaching into program participants' lives; lack of staff capacity or specific training to assist staff to work in this way; and the necessary focus of

much of our work on addressing immediate needs. The review of my life has brought this to the fore, underlining its significance to me over the years, and it is strongly supported by material emerging from Ignatian and Jesuit heritage. This feature is now included in the enhanced Practice Framework (Figure 7.8).

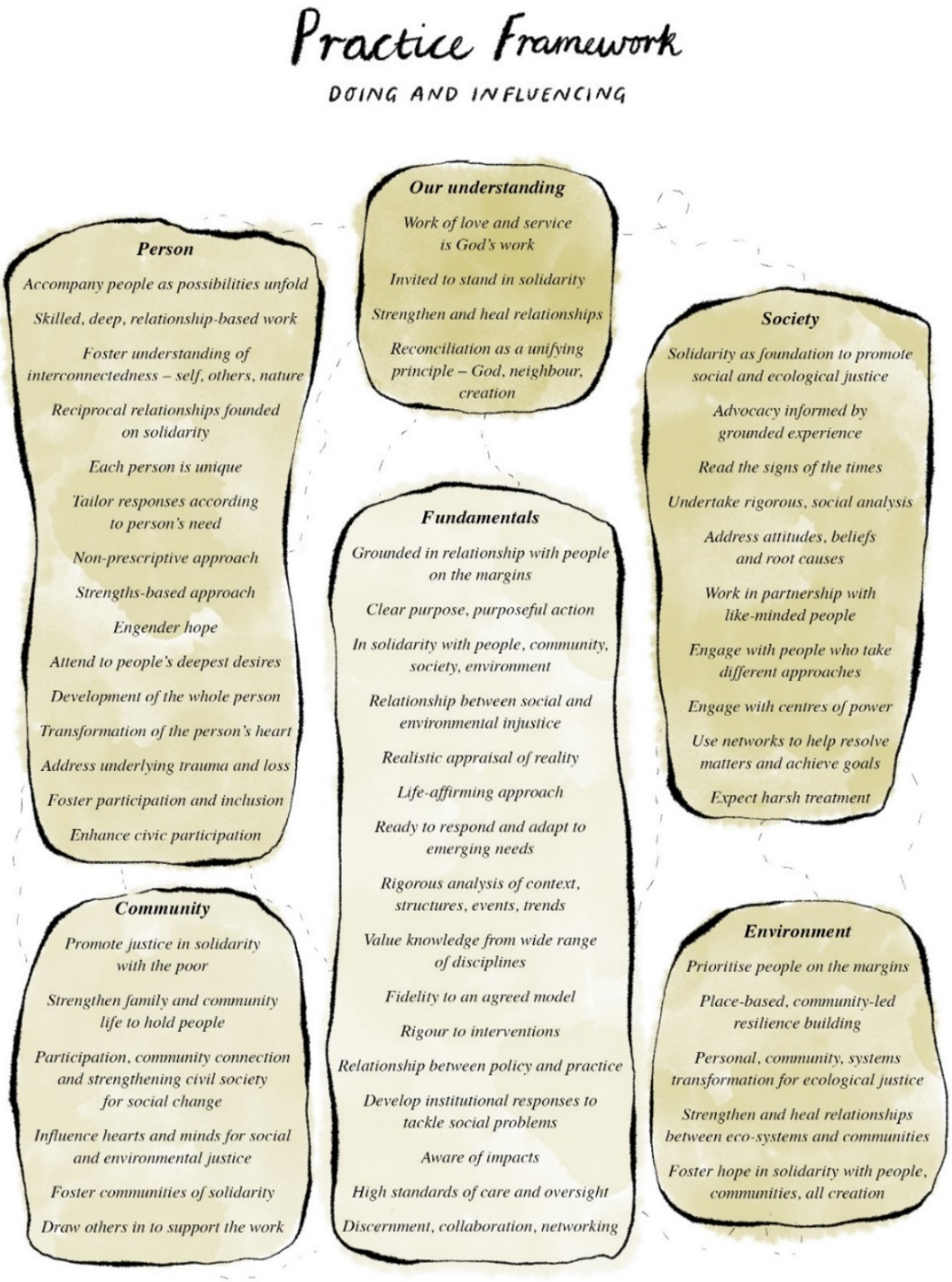


Figure 7.8 Practice Framework

Another matter that stands out in my personal material is the recency of Jesuit Social Services' focus at the community level to *influence hearts and minds for social and environmental justice* and *foster communities of solidarity*. While the antecedents of these features are strongly present in my autoethnography, it is only in recent years that I have given them consistent attention within Jesuit Social Services. Prior to that, the organisation's influencing efforts had been targeted to decision-makers. The expanded focus of influencing occurred as a result of 'reading the signs of the times', which prompted the exercise of 'Re-imagining Jesuit Social Services', discussed in the final Act of Chapter 5. In that process, it became apparent that community attitudes to people on the margins were hardening and that there was a lack of political leadership in relation to significant social justice concerns. Reading the Jesuit literature in the course of my study underlined the importance of influencing hearts and minds in order to tackle injustice at its roots in the human heart and strengthening civil society as a means to bring about social change. These factors contributed to my decision to extend our practice in line with this commitment. This is reflected, in part, by my decision to choose *solidarity* as a key element of Jesuit identity. In choosing *solidarity* as an element, I use it to prioritise our approach not only with people on the margins, but also with communities, broader society and the environment. This is now incorporated in our Practice Framework. Features related to the Practice Framework are presented in Figure 7.8.

Business Processes

The words that best capture the essence of the Business Processes domain are 'supporting' and 'serving'. These speak to the organisational priority of the people and the work, and reflect that business processes exist to serve and support them in line with our vision, mission, values and purpose.

Beyond identifying features that speak to our understanding of reality and to the fundamentals of an approach consistent with this, I identified features that point to how these are given expression. In this domain, the pursuit of excellence in organisational processes and a focus on sustainability emerge as critical ways to serve and support the organisation's purpose. This highlights the priority of ensuring people's dignity and safety at all times, and engaging people with high-quality interventions. It also underscores the interconnectedness of the three domains of the Way of Proceeding, and the need for coherence between them.

These findings support and strengthen Jesuit Social Services' practice of infusing all business processes with Jesuit heritage. The organisational guideline for all policies articulates our understanding of the human dignity of each person and the interdependence of all life. It specifies that infrastructure exists for the effectiveness of the organisation, that people are more important than things, and that material resources

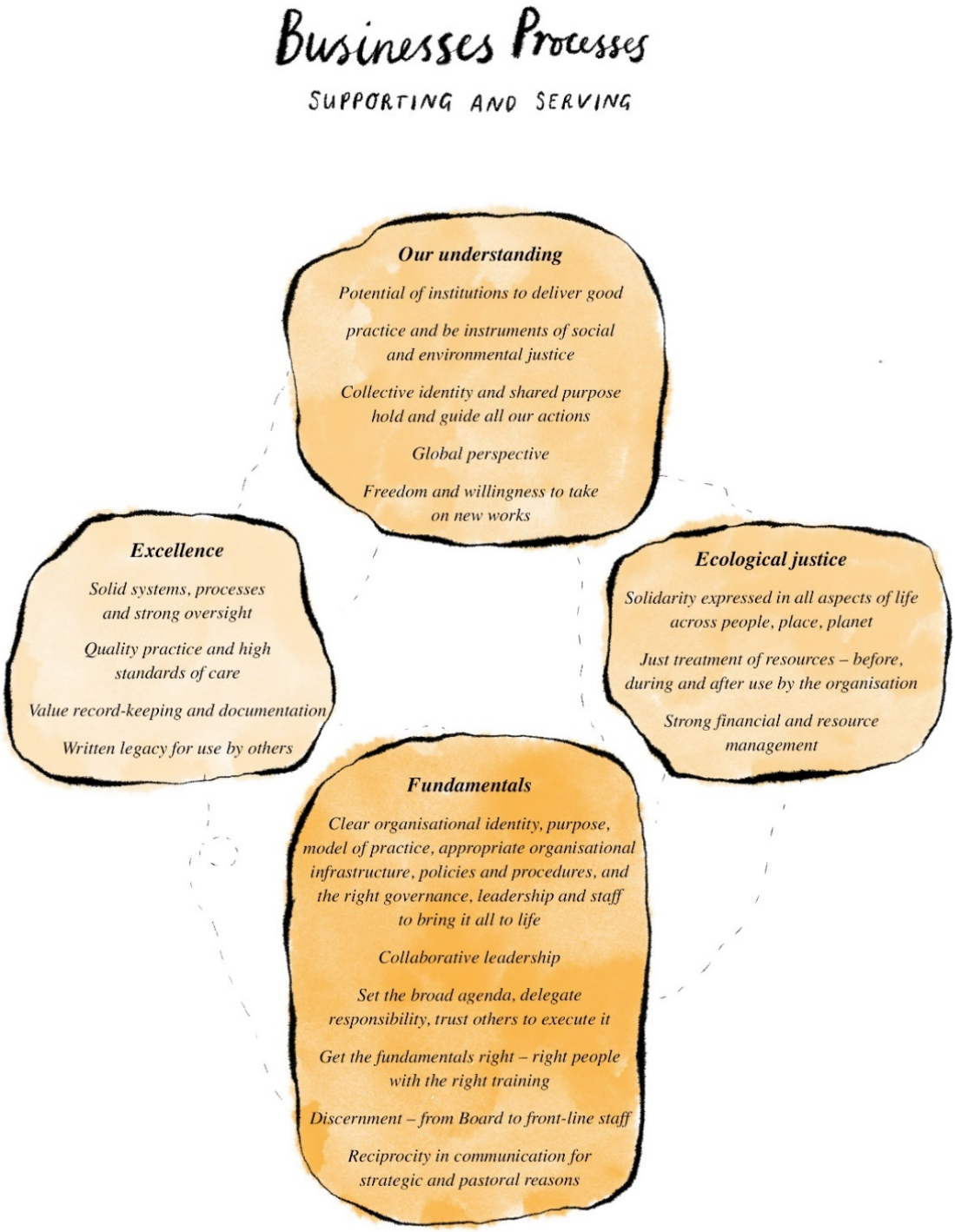


Figure 7.9 Business Processes

are ultimately for the service of the poor and disadvantaged. It then outlines principles consistent with our heritage that underpin organisational processes, such as continuous evaluation of the effectiveness of our business processes and their alignment with our vision, mission and values; and assigning responsibility according to the principle of subsidiarity (Jesuit Social Services, 2017). This organisational policy guideline is then applied to individual policies across governance; ecology and resource management; financial management; program and service delivery; quality, risk and compliance; human resources; and occupational health and safety. An example of its application is the policy for determining whether to take on new work, which stipulates consideration of the Norms for the Choice of Ministry (Ignatius of Loyola, n.d./1996c, pp. 284–288, n. 622–623). Applying these norms means that business decisions are values-based.

Reflecting on this domain reinforced my view that Business Processes are a tangible way to give expression to the organisation's identity, across its treatment of people, place and planet. Further, this domain is strengthened by the identification of a feature that applies to the organisation as a whole, not just particular business processes: *potential of institutions to deliver good practice and be instruments of social and environmental justice.* This points to the role a community service organisation can play beyond its most apparent functions and underlines its responsibility to use its power for the greater good. Features related to the Business Support domain are presented in Figure 7.9.

LOGoS Tree Model

Chapter 5 presented some of the tools that I developed to assist in fostering the Jesuit identity of the organisation – *one foot raised*, the Way of Proceeding framework, and the tree image. I used these tools creatively, changing how I did this over time, and aware that there was slippage and also inconsistencies in my use of them. Loosely speaking, when discussing organisational identity with staff, I moved between using the Way of Proceeding framework and the tree image, locating elements from Jesuit heritage in the central well and the roots of the tree respectively. Alongside this, at times I used the *one foot raised* image to capture the essence of Jesuit identity. Yet it became clear to me that this image was not a comprehensive expression of Jesuit identity; it wasn't able to accommodate many of the elements of Jesuit identity that had emerged in my research (for example, *love, oneness, gratitude, solidarity*), but it was valuable in capturing the *magis*/*discernment* dynamic, which is central to the Jesuit way of being in the world.

And while the Way of Proceeding remains the preferred mechanism to demonstrate how Jesuit identity can be operationalised across people, programs and processes, its limitation is that it does not capture the dynamism of organisational identity. Given the demonstrated usefulness and power of the two figures, I sought a way to synthesise them. The LOGoS Tree Model provided the vehicle for this (Figure 7.10).

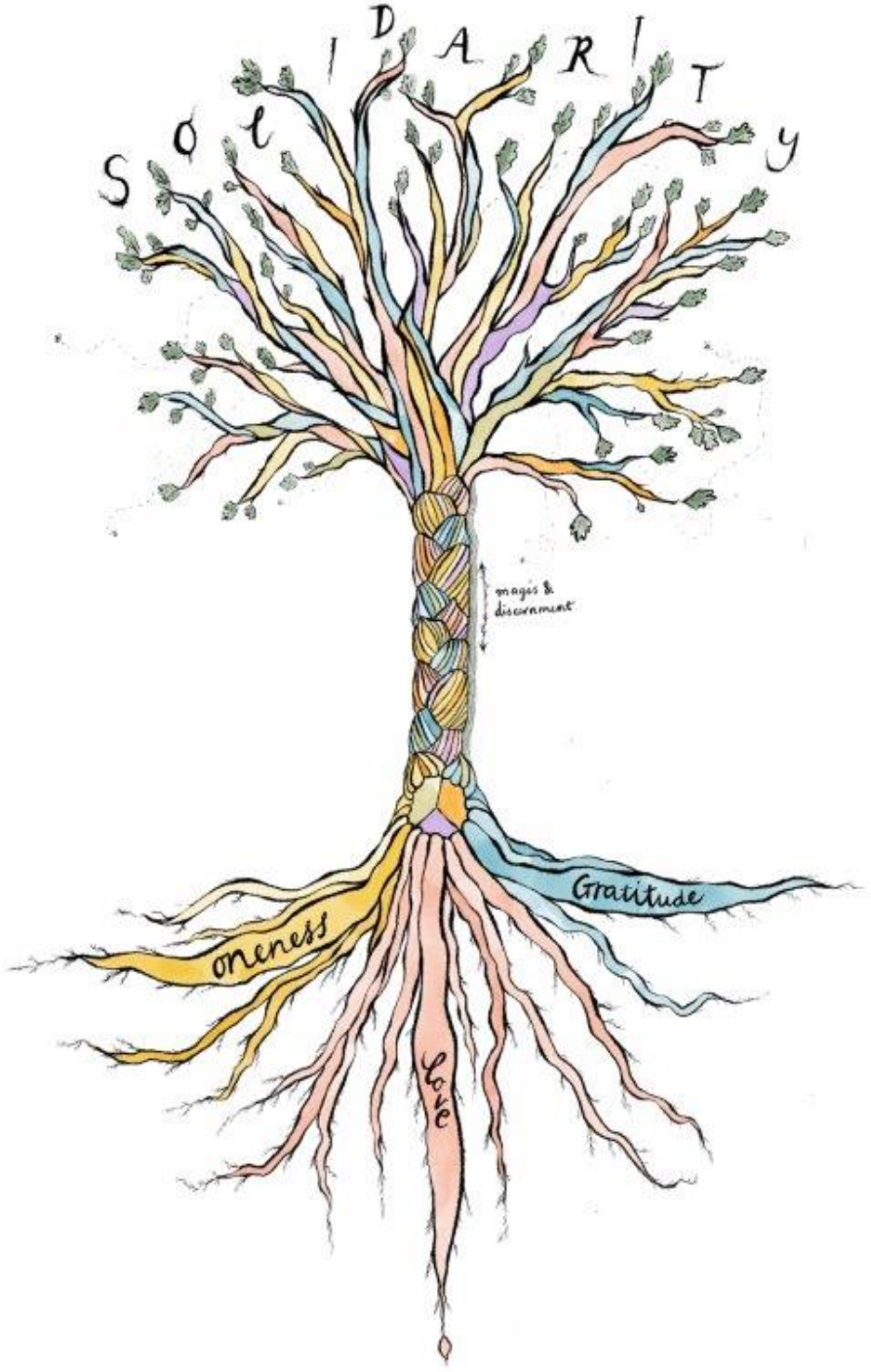


Figure 7.10 LOGoS Tree Model

Preparing the Soil: Introducing the Model

In the final Act of Chapter 5, I introduced the tree image that I have used over recent years to capture and communicate my understanding of organisational identity. The LOGoS Tree Model I now present builds on that earlier understanding, which has continued to evolve during the writing of this thesis. It is enriched in particular by the fruits of my reflection on the three sources of knowledge. This includes the updated list of elements and associated features, the application of these to the Way of Proceeding framework, and the incorporation of this framework and the *one foot raised* image into the LOGoS Tree Model. In developing this model, I have been mindful of the operating context and informed by the organisational identity literature.

The LOGoS name is derived from using the first letter of the first four elements – *love*, *oneness*, *gratitude*, *solidarity*. The 'o' refers to the 'operationalisation' of the organisation's purpose that occurs through the Way of Proceeding framework, and is supported by the dynamic of the *magis* and *discernment* elements. It highlights the importance of action in the world – across the domains of Human Spirit (being *contemplatives in action*), Practice Framework (*doing* and *influencing*) and Business Processes (*supporting* and *serving*). It reflects the importance of our *love*, *oneness*, and *gratitude* being expressed more in deeds than words through our approach of *solidarity* across people, place and planet.

Revisiting the Literature

The first point I make relates to a simple but fundamental change in terminology. I no longer refer to the tree image, but to the tree model. This change in language reflects a development in my thinking regarding the ontology of organisational identity and points to my first finding in relation to this field of study. By combining the word 'tree', which has entity status, with the term 'model', which suggests dynamic flow, I foreground an understanding of the ontology of organisational identity that bridges the sharply demarcated boundary identified in the Literature Review between entity and process. At the outset, I had a more fixed entitative perspective regarding this matter, but, as reflected in my autoethnography, the ecological, organic nature of the tree prompted me to see that while organisational identity does have entity status, it is also dynamic flow. My reading of the literature alerted me to this ontological convergence (Gioia & Hamilton, 2016). As identified in the Literature Review, the analogy of an acrobat on a high wire captures the essence of this emerging understanding: the acrobat maintains the

image of stability through a continual process of micro-movements to correct imbalance (Bateson, 1979, cited in Gioia & Hamilton, 2016), just as organisational identity is dynamic while appearing to be consistent. The tree model I developed provides support for the growing convergence between these perspectives.

The second finding emerging from my research in relation to the organisational identity field relates to the epistemological debate about the social actor versus social construction perspectives. Based on my experience at Jesuit Social Services and in the broader Jesuit enterprise, at the outset I believed – and this belief endures – that such a thing as Jesuit identity exists. In this sense, Jesuit identity is given to us, not constructed by us. Reflecting this position, the social actor perspective of sense-giving is strong in the Jesuit tradition. In the Literature Review, I noted Boers and Ljungkvist's (2018) claim that when an organisation references and makes claims about the founder, the founder becomes an identity referent. This was abundantly clear in relation to Ignatius throughout my autoethnography and also in the reflective review of Ignatian and Jesuit heritage, demonstrating the strength of the social actor perspective of sense-giving in this tradition. Working with the tree image and recognising the different functions of various parts of the tree, however, allowed me to acknowledge something I had seen in practice, but had not understood as integral: staff are involved in constructing organisational identity. They do this by engaging with the organisation's deep story in the light of their own stories and experience, and then translate and give expression to this identity in contemporary circumstances. Conversations about 'who we are' and 'how we do things around here' signal this exercise of ongoing meaning-making. Some staff play a significant role in this endeavour, highlighting the importance of 'identity custodians' (Schinoff, Rogers, & Corley, 2016, p. 221). In the Jesuit tradition, considerable focus is put on each person's agency, and, in relation to organisational identity, this means that each person exemplifies and gives expression to it. My experience is replete with examples of staff engaging with the foundational story, making it their own, enhancing it and communicating it. Instances of this occur daily in formal and informal settings, reinforcing the social construction perspective of sense-making. This emerged strongly in my autoethnography.

When I first engaged with the literature, I read about both perspectives and contemplated how these might complement each other, as both seemed present within Jesuit Social Services. I was excited when I learned that some scholars propose that organisational members can recognise that the organisation is a social actor, while at the

same time playing a role in creating and sustaining the organisation's identity (Schinoff, Rogers, & Corley, 2016). The tree model I have developed provides support for the growing convergence between the social actor and social construction perspectives that lies at the heart of the central epistemological debate in the field.

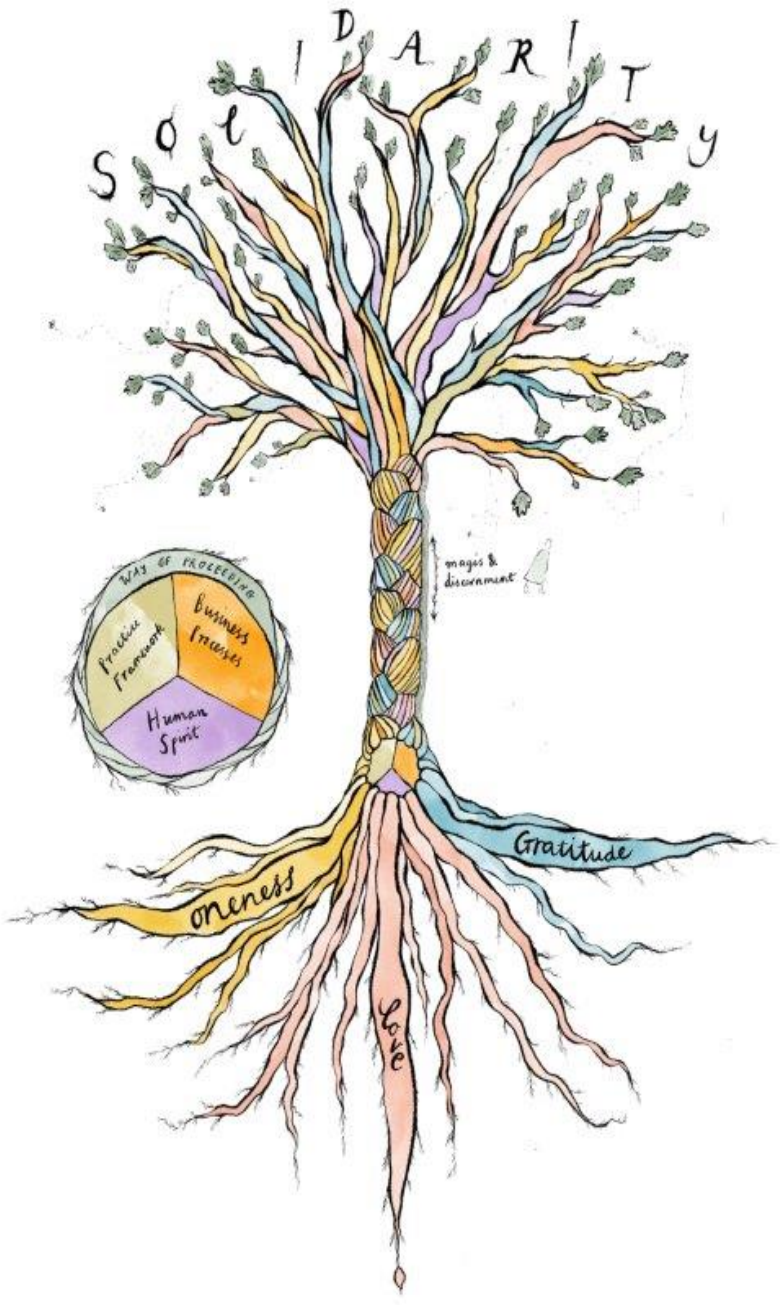


Figure 7.11 LOGoS Tree Model showing Way of Proceeding and *one foot raised*

It captures the understanding that both the social actor (sense-giving via foundational elements) and social construction (sense-making via organisational members) perspectives apply. I will return to this in Chapter 8, when I revisit key points from the organisational identity literature and map out the contribution of this study. More specifically, in terms of a Jesuit organisation, my model reflects the understanding that heritage alone will not guarantee organisational identity; but nor is it constructed solely by organisational members. Rather, organisational identity is understood to depend on, be expressed through, and fostered by the dynamic interplay between all parts of the entity.

Presenting the LOGoS Tree Model

I use the LOGoS Tree Model metaphorically to draw an analogy between the role that the tree and its constituent parts play in fostering the life of the tree and the role that different parts of the organisation play in fostering the Jesuit identity of a community service organisation. I note here that I am not claiming scientific knowledge of trees; rather, my use of this image is primarily symbolic. The LOGoS Tree Model presented in Figure 7.11 demonstrates how the Way of Proceeding and the *one foot raised* image are incorporated into the model.

Roots

Trees that have a tap root system have a main root that emerges from the radicle, or 'root of the plant embryo' (Tudge, 2005, p. 426). The radicle grows downwards to form the tap root, with other roots branching off from this main root. Roots of a tree may be connected with the roots of other trees in a vast underground network of fungal mycelium, participating in 'cooperative feeding' (Tudge, 2005, p. 261) to the benefit of all. When part of a tree's root system dies, an equivalent portion of the leaves and branches is affected; similarly, when the leaves suffer or there is ongoing defoliation, parts of the root system die (Perry, 1982). In the LOGoS Tree Model, as a reflection of its Jesuit organisational identity, *love* is the deepest foundational element, or radicle, that permeates everything (Figure 7.12). It is the unifying mystery at the heart of life, and gives rise to other elements that branch off from it.

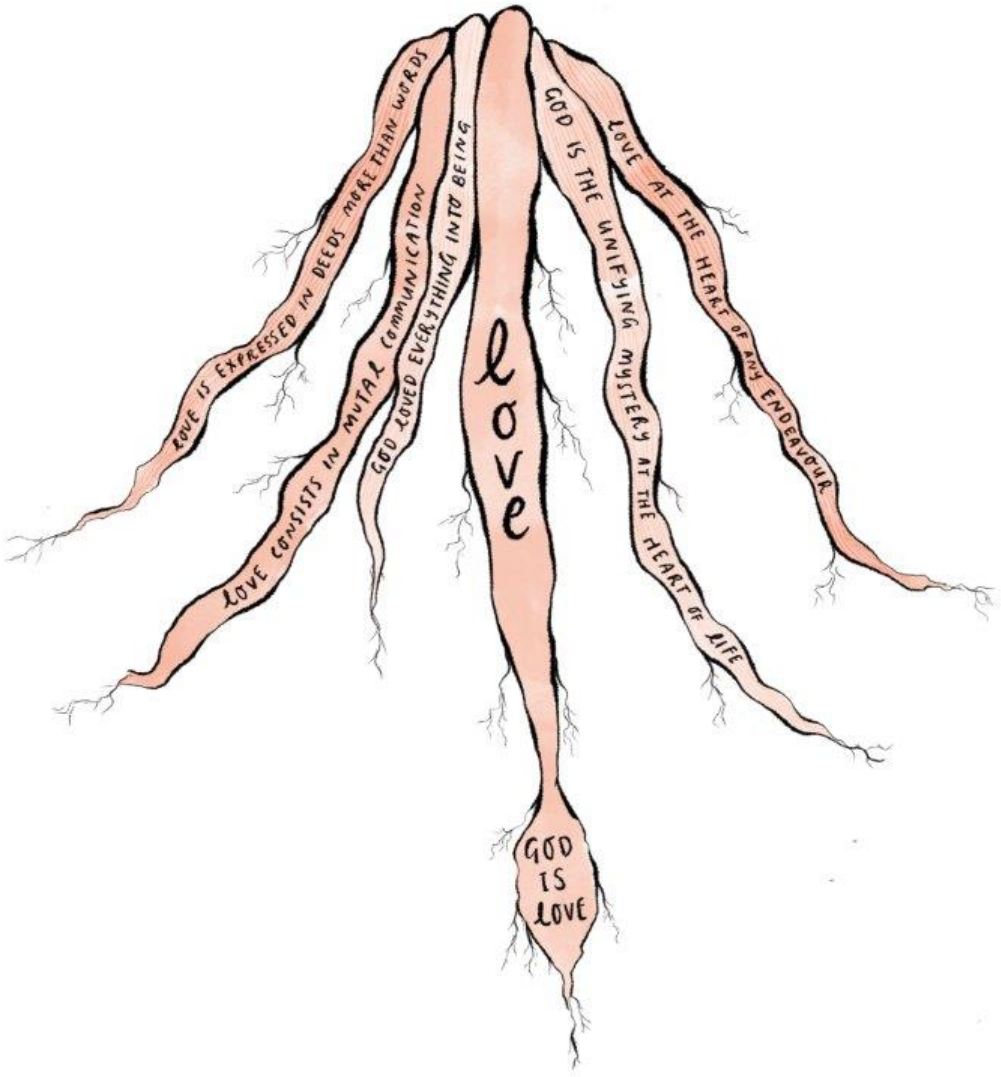


Figure 7.12 Love

The second foundational element is the understanding of *oneness,* that everything is interconnected, interdependent (Figure 7.13). This prompts us to take a universal perspective (in acknowledgement of the interconnected nature of justice and injustice). This foundational understanding of the oneness of everything orients us to see our very essence as relational. We understand that we are held in a web of relationships that holds and sustains us all. This provides the foundation for our solidarity and the basis for all activity. It leads to our Purpose, which is to foster and heal relationships – across people, place and planet – including with self, family, school, community, workplace, the natural environment and God.

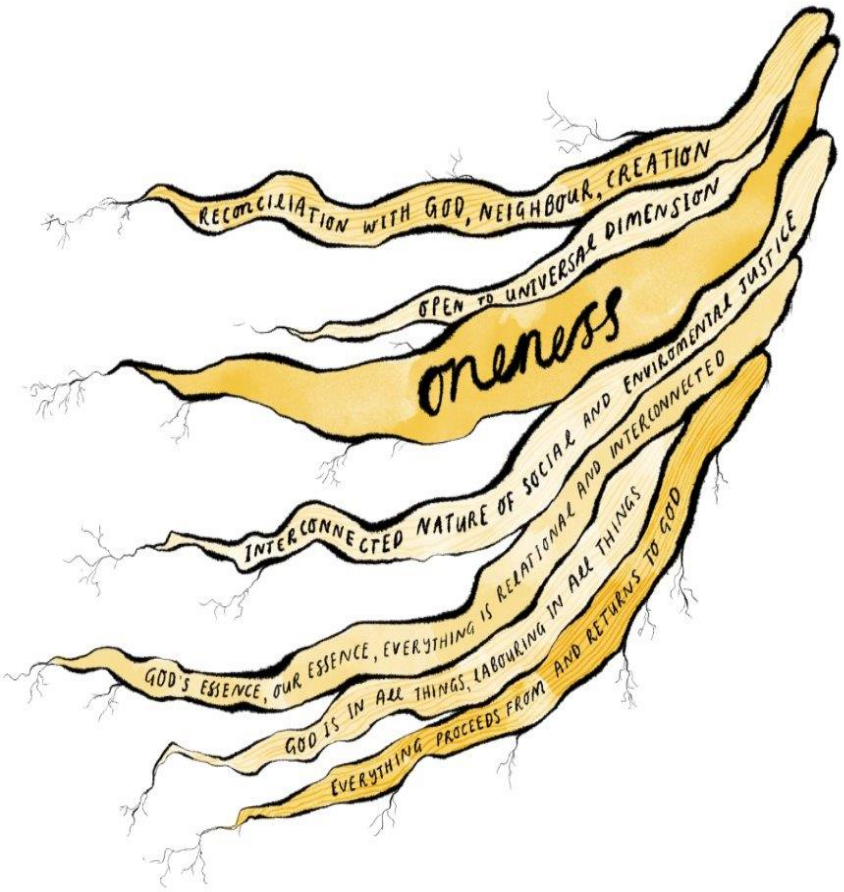


Figure 7.13 Oneness

Figure 7.14 Gratitude

Gratitude is our response to the foundational elements of *love* and *oneness* and the reality that everything is gift (Figure 7.14). *Gratitude* fosters the disposition to be free and available to respond to the invitation to collaborate with God in the work of love, healing and reconciliation – to take on new works, go to new places, and to be flexible, nimble and adaptable. It is a hope-filled starting point.

The two foundational elements of *love* and *oneness*, and the element of *gratitude*, which is our response, are depicted at various levels of the tree's roots. The organisation, while a distinct entity, is part of a wider ecosystem. The organisation can benefit from giving and receiving at the deepest levels. The elements of *love, oneness,* and *gratitude* are given expression in the element of *solidarity* which is the approach that characterises our work in the world (Figure 7.15). This is depicted in the tree's branches, which represent the organisation's programs and advocacy, and its leaves, which represent the organisational members.

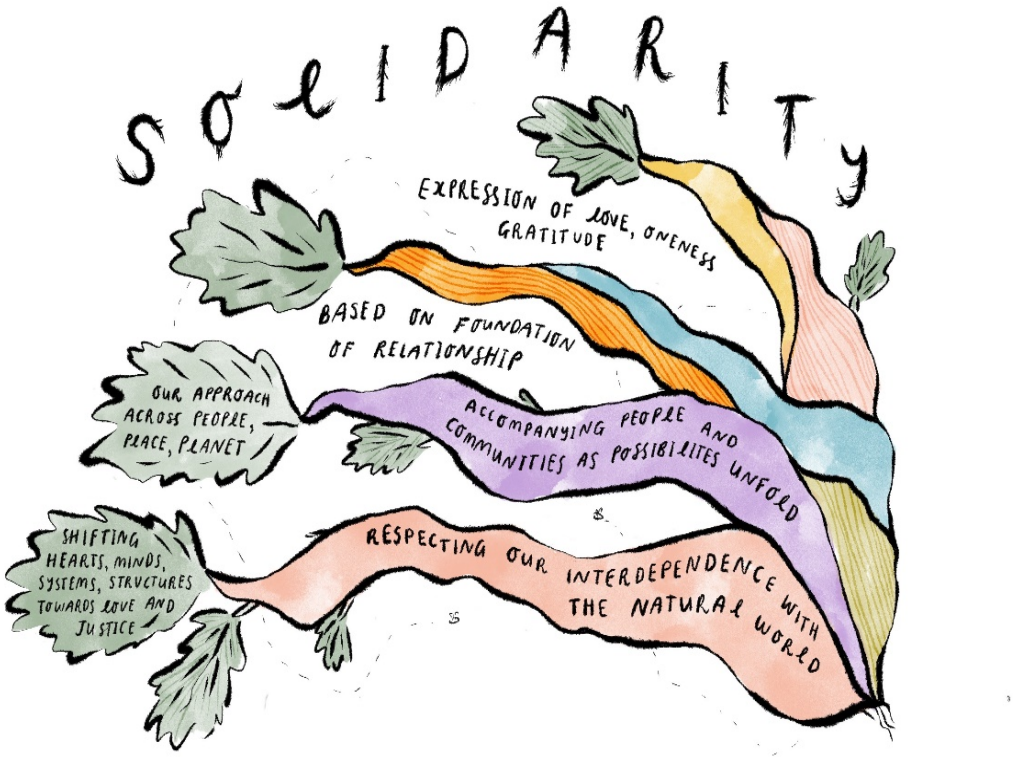


Figure 7.15. Solidarity

Just as the branches and leaves of the tree deteriorate when disconnected from healthy roots, the organisation suffers when it becomes detached from its deep values expressed in the elements depicted in the roots. This might manifest in reduced quality of programs, or disengagement of staff. Similarly, when the lived expression of *solidarity* with people, communities and creation is diminished, or the organisation's people are not valued for themselves and for their vital role in ensuring the health of the organisation, the very heritage that has given birth to the entity suffers. It can be talked about; it can be referred to; but it is not a vibrant, living force.

Trunk

The trunk, where the tree becomes visible to the world, provides structure and support to the branches. Beneath the bark, fine vessels carry water and nutrients up from the roots to the leaves and the fruits of photosynthesis down from the leaves to the roots and the rest of the tree (Tudge, 2005, p. 82). The strength of the tree and its capacity to grow tall is due, in part, to the collective strength of the vessels transporting fluid.

The elements that are located figuratively in the roots nourish the entire organisation as they move into the body of the organisation and through to organisational members. The Way of Proceeding framework is incorporated into the tree model, and situated at the base of the trunk, analogous to where the organisation first becomes visible in the world. This highlights that elements related to organisational identity are operationalised through our people, our practice and our organisational processes (the three domains of the framework). Within the LOGoS Tree Model these domains are now represented as three interwoven threads, travelling up the trunk and into the branches to the leaves. This reflects that these domains are interdependent, reinforce one another and apply to all aspects of the organisation.

Articulating the features from Jesuit heritage that apply to each domain indicates how the organisation's identity is expressed through each (see Figures 7.12–7.15). As we move to enact our Purpose, our Guiding Principle is the *magis* – choosing the option that is more loving, effective and influential, meeting the greatest need, and always seeking the greater good. To achieve this, we marry our orientation towards the *magis* with the Process of *discernment* in an ongoing dynamic that permeates all activity, fostering our capacity to be free and available to live our Purpose (see Figure 7.16).

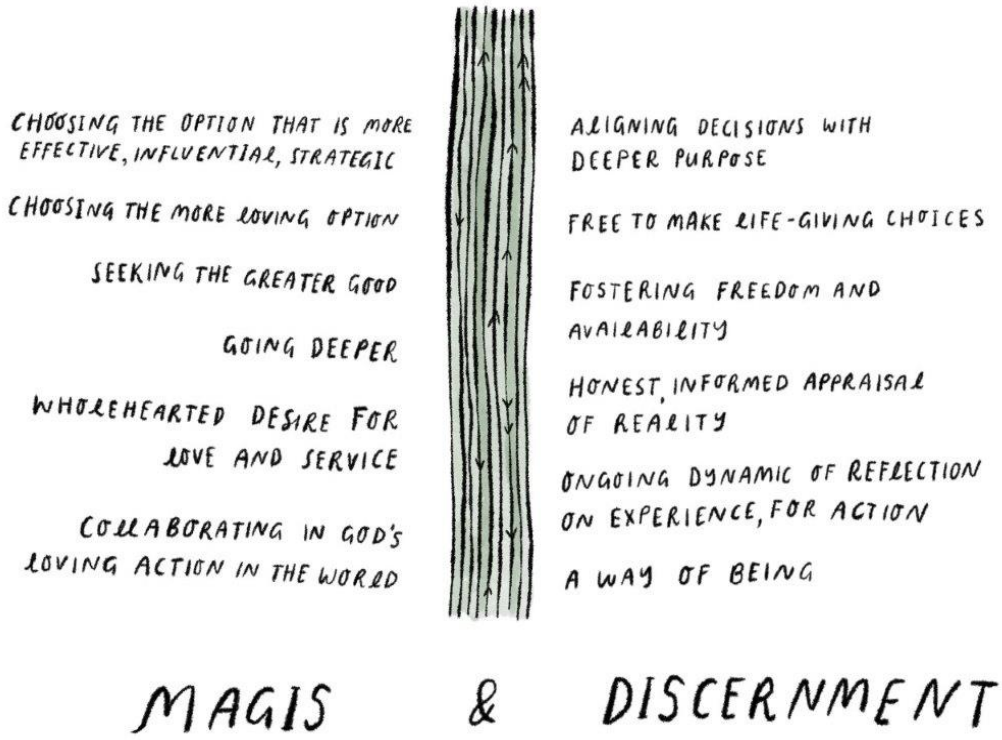


Figure 7.16 *Magis* and Discernment

Similar to the role of the vessels in the tree's trunk, the *magis/discernment* dynamic that takes place throughout the body of the organisation makes the entity's strength and growth possible. This dynamic is captured in the *one foot raised* image that represents the essence of how to be in the world, consistent with Jesuit identity

Leaves

Typically, the structure of leaves ensures maximum surface area (they are flat and thin) in order to provide the greatest exposure of the green pigment, chlorophyll, to sunlight. This facilitates the process of photosynthesis, which occurs when chlorophyll traps energy from the sun, and acts as a catalyst to transform water from the roots into hydrogen and oxygen. In this process, chlorophyll 'acts as host and mediator' (Tudge, 2005, p. 254). Oxygen is released into the air; hydrogen combines with carbon dioxide from the air and water from the roots to form sugars and other nutrients that are then transported back to the roots to nourish them. Rather than the roots pumping water up to the leaves, leaves pull water up through vessels in the trunk. Leaves have physical

defences, such as pheromones that transmit scents and physical barriers (such as waxy or prickly surfaces) to protect them against parasites (Tudge, 2005).

In the LOGoS Tree Model, the role of organisational members is analogous to the tree's leaves. Jesuit heritage has the potential to nurture and support staff, but it is only through their engagement with it that this potential is realised. Staff are the active agents drawing on this heritage (compared with having it imposed or pumped into them), and it is through them that it is brought into contact with the world. Staff act as 'host and mediator' for the heritage, underlining the point that it is in and through their engagement with reality that organisational identity is ultimately expressed. The approach of being in *solidarity* with people, communities and creation makes this visible. Staff not only express organisational identity but also contribute to and enrich the living heritage of the organisation. Thus, just as the heritage feeds them, their *solidarity* and engagement with the world help to transform it; they then send the fruits of this engagement back to the roots to nourish the living heritage. Like the leaves of the tree, which are exposed to the sunlight, the more staff in a community service setting maximise their 'exposure' to the world through their solidarity with people, communities and creation, the greater the potential for transformation: participants and the community are nourished by this interaction, and the roots of Jesuit heritage are fed and continue to evolve through this process. Just as the leaves are able to defend the tree from parasites, staff who embody the organisation's identity can act to ward off threats to its integrity.

The Tree in Its Environment

The tree does not function as an independent organism. From the roots to the leaves, there is a reciprocity of relationship between the tree and its environment. The roots not only nurture the tree, they also bind the soil and, through the network of fungal mycelium, enjoy an expansive underground network of support and communication well beyond the limits of its own entity. The trunk and branches of the tree provide a home to animals, birds, bees and insects. The leaves not only function to support the tree through the process of photosynthesis but also produce the oxygen upon which all life depends, sequester carbon, and provide food, shade and beauty for others; they emit pheromones to alert other trees to threats, and they fertilise the soil (Tudge, 2005).

Organisations are situated in, and adapt to, their environments. Optimally, their heritage or foundations, rather than being rigidly applied, are given tailored expression according to the context. Organisational members perceive and feed back to the

organisation what is happening in the world. Reading the signs of the times, they tune in to emerging needs, threats and opportunities. This allows the organisation to respond in a nimble and timely manner, and to evolve. As a social change organisation, the entity does not exist only for itself and the various activities it undertakes. Just as the tree is part of its ecosystem, the organisation is part of the community and wider society, and seeks to make a contribution to the life of both, recognising that it, in turn, is part of and supported by these.

Schema

Drawing on the LOGoS Tree Model, I articulate a supporting narrative that arranges the elements in a schema that spells out their interrelationship and incorporates the Purpose of the organisation and the framework for operationalising it. The schema comprises core components: Foundations, Response, Purpose, Operationalisation, Approach, Guiding Principle, and Process. The relationship between these components in the schema is outlined in the following statement:

> Our **Foundations** prompt our **Response** that directs our **Purpose.** This is **Operationalised** through our people, practice and processes, and reflected in our **Approach**, oriented by our **Guiding Principle** and **Process.**

In applying the elements I discerned through my reflective process to the above statement, I present the following summary:

> Our Foundations of *love* and *oneness* prompt our Response of *gratitude*. This is Operationalised through our Way of Proceeding, and reflected in our Approach of *solidarity*, oriented by our Guiding Principle of *magis* and Process of *discernment*.

In the context of a community service organisation with a Jesuit identity, the schema can then be expressed more fully in the following narrative:

> The deepest foundational element is that God is *love* freely given, the unifying mystery at the heart of life, present in all things.
>
> From this, we understand the *oneness* of everything; that everything is interconnected, interdependent. God's nature is relational, our very essence is

> relational. We are all held, nourished and sustained in a web of relationships. All of this is a gift. This leads us to understand our Purpose to foster and heal relationships with self, family, school, community, workplace, the natural environment and God. Relationship is our essence, not just an approach we take to our work. In recognition of the oneness of all things**,** including injustice, we take a universal perspective.
>
> This understanding of reality prompts our response of *gratitude* out of recognition that everything is gift to be received. It fosters the disposition to be free and available to respond to the invitation to collaborate with God in the work of love, healing and reconciliation.
>
> We operationalise our Purpose through our Way of Proceeding and its three interrelated domains: Human Spirit (our way of being: *contemplatives in action*); Practice Framework (our way of working: *doing* and *influencing*); and Business Processes (our way of operating: *supporting* and *serving*).
>
> The elements of *love*, *oneness* and *gratitude* are the basis for our approach of *solidarity*, to which we give expression across people, place and planet.
>
> In enacting our organisational Purpose, our Guiding Principle is the *magis* – choosing the option that is more loving, effective and influential, meeting the greatest need, and always seeking the greater good. To achieve this, we marry our orientation towards the *magis* with the Process of *discernment* in an ongoing dynamic that permeates all activity, fostering our capacity to be free and available to live our Purpose.

Application of the Model to Other Community Service Organisations

My research aim was specifically related to Jesuit identity. As such, my experience and the reflections I have presented to date are geared to that purpose. However, I had anticipated that my findings might have broader application beyond the Jesuit enterprise, and that view has been confirmed by the research process. I believe the LOGoS Tree Model for organisational identity, incorporating the Way of Proceeding framework, and its accompanying schema can be fruitfully applied to community service organisations beyond the Jesuit enterprise.

The Tree Model

The Tree Model I created to foster Jesuit identity can be stripped back to basic principles that can be tailored for specific circumstances. Drawing on this model and my

understanding of organisational identity, I distilled eight principles to assist community service organisations in their efforts to foster organisational identity in their settings.

1. An organisation with a strong identity has clearly articulated foundational elements that root the organisation in its value base.
2. These foundational elements give rise to the purpose and other core statements of the organisation – for example, vision, mission, values.
3. The organisation's purpose is operationalised across the interconnected domains of organisational members (human spirit); the core business of the organisation (practice); the organisational infrastructure that supports the core business (business processes).
4. The organisation's identity becomes visible in the world through its approach to the work, and in the principles and processes that guide all activity.
5. The essential nature of organisational identity is both entity and flow. It has entity status and is also in an ongoing process of being enacted (ontology).
6. There is a dynamic relationship between foundational elements and organisational members – sense-giving (social actor) and sense-making (social construction) – with each nourishing the other (epistemology).
7. Values-based organisational identity is therefore expressed throughout the whole organisation when there is coherence between the foundational elements and the practices, processes and people who give expression to it in the daily life of the organisation.
8. Organisations are part of the social fabric of the community and benefit from and contribute to this.

Schema and Components

The schema emerged in the process of articulating a model to foster the Jesuit identity of a community service organisation. By specifying its components – Foundations, Response, Purpose, Operationalisation, Approach, Guiding Principle, Process, and Way of Proceeding – I have provided an architecture that other community service organisations might use and adapt to strengthen the identity of their organisations.

There are a number of ways that an organisation can adapt the schema for its own use. It could use the schema's components, but apply its preferred language to them. For example, an organisation might choose to replace the Foundation of *love* with another Foundational element, such as 'hope'; similarly, an organisation might choose to substitute the Approach of *solidarity* with 'accompaniment' or 'service'. Alternatively, an organisation might decide comprehensively to adopt the schema along with its existing components, but to adapt it for its own purposes using non-religious language. With that in mind, I have developed a version for broader use beyond the Jesuit network. In this revised schema, *love* is the primary, foundational element that flows into and sustains everything. It points to our *oneness* and encourages us to take a universal perspective. From this, we understand the essentially relational nature of everything and the gift of the web of relationships that holds, nurtures and sustains us. These foundations point to the organisational purpose of fostering and healing relationships. This understanding of reality prompts a response of *gratitude* and of being free and available to respond. The guiding principle of striving for greatest impact and the process of discernment are interrelated in an ongoing dynamic across everything supporting the organisation to be free to live out its purpose. The organisational purpose is operationalised through the Way of Proceeding.

Way of Proceeding

The Way of Proceeding framework lends itself to being used across sectors and different types of organisations. The fundamental principles at its heart are that organisational identity is operationalised through the people, practices and business processes of the organisation; that these domains are interconnected; and that there needs to be integrity within and across these domains.

Conclusion

In this chapter, I first addressed the secondary research aim of *identifying the elements and features that speak to Jesuit identity of a community service organisation.* This involved articulating a list of elements and associated features – distilled from personal, Ignatian and Jesuit material – that speak to Jesuit identity of a community service organisation. To achieve my primary research aim of *articulating a model for fostering the Jesuit identity of a community service organisation in a contemporary context*, I developed the LOGoS Tree Model. The model strengthens the findings relating to Jesuit

identity and the Way of Proceeding framework by identifying numerous features that fill out the meaning of each domain and how it should be operationalised. This process has generated two new findings that I had not anticipated at the outset: The first is the development of the schema that supports the LOGoS Tree Model by identifying the components that should be considered in conceptualising and operationalising organisational identity. The schema assigns the elements relevant to Jesuit identity to the various components, thereby spelling out their interrelationship. The second is the clarification of the meaning of the *one foot raised* image and its incorporation within the LOGoS Tree Model.

Finally, I turned my attention to community service organisations outside the Jesuit enterprise to apply learnings from my research to those entities. I distilled principles from the LOGoS Tree Model that can be used to foster values-based organisational identity in those settings. I reviewed the schema and articulated a non-religious language version that has broader application beyond Jesuit organisations, and I highlighted the three principles that underpin the Way of Proceeding framework.

In keeping with the Ignatian Pedagogical Paradigm, I now move to the final component of evaluation. In Chapter 7, I will stand back from the research process and outcomes I have presented in this chapter in order to note what progress has been made in terms of contribution to knowledge in relation to Jesuit identity in the context of a community service organisation and an operational model for fostering that identity, and to the field of organisational identity. I will also comment on limitations of this study and suggest areas for further research.

CHAPTER 8

Evaluation

My research aim was to articulate a model for fostering the Jesuit identity of a community service organisation in a contemporary context. My secondary aim was to identify the elements and features from Jesuit heritage that speak to Jesuit identity of a community service organisation. I achieved these aims, presenting and discussing my findings in Chapter 7. I adapted the Ignatian Pedagogical Paradigm to structure my research, and the final component, Evaluation, involves standing back to assess achievements and identify opportunities for further development. The focus of this chapter is thus to identify what new knowledge was generated by the research, the limitations of this study, and what matters are emerging that require further study. In keeping with the Ignatian Pedagogical Paradigm, which structures the thesis, and my autoethnographic methodology, this chapter offers a final reflection on the research process.

In Chapter 1, 'Introduction', I outlined the value of articulating a model for fostering the Jesuit identity of a community service organisation. In addition, I pointed to contextual factors that lent urgency to this endeavour. These factors emerged through my experience of working across two worlds: the Society of Jesus and the Australian community sector. From that vantage point, I identified challenges that my research might address. These include the Jesuits' concern to ensure their organisations operate with a Jesuit identity and the need for organisations in the community sector to operate with a values-based identity. My research has the potential to assist both fulfil their social purpose. Further, I argued that beyond simply dealing with the challenges facing each, there is an opportunity to bridge these worlds with the aim of enriching both.

In Chapter 2, 'Methodology', I positioned myself in relation to the research. I then discussed my choice of autoethnography as a methodological approach that allowed me to draw on my experience and synthesise this with theory and knowledge. I introduced the Ignatian Pedagogical Paradigm that I adapted to guide my approach to personal data and to structure the entire thesis.

In Chapter 3, 'Context', I argued that a key challenge facing the community sector is how to maintain its purpose in the context of the dominant neoliberal paradigm. I outlined the value of operating with a values-based identity, thereby pointing to the benefits of articulating such a model that could be adapted for use by organisations in the

community sector. In relation to the Society of Jesus, I argued that a key challenge it faces is how to optimise its potential to fulfil its mission of reconciliation and promotion of justice. I suggested that strengthening institutional responses is an important way to address this. I also identified the current situation of diminishing numbers of Jesuits, increasing numbers of laypeople staffing and leading their works, and the Jesuits' associated concern to ensure the Jesuit identity of their institutions. These factors point to the importance of articulating a model to foster the Jesuit identity of community service organisations that could be adapted for use in various settings.

In Chapter 4, 'Literature Review', I examined the knowledge context of the organisational identity literature to provide a strong theoretical foundation for the model I developed. I identified a knowledge gap in relation to fostering Jesuit identity in the context of community organisations and explored the scholarly debates about the ontology and epistemology of organisational identity. I signalled that my research had the potential to make a contribution to both matters.

In Chapter 5, 'Experience', I adopted an autoethnographic methodology to review my life experience and adapted the Ignatian Pedagogical Paradigm to help structure and analyse this material. In this process, I traced the antecedents to my existing knowledge about Jesuit identity and how to foster it in a community service organisation, and I identified new knowledge pertinent to my research aim.

In Chapter 6, 'Reflection', I reflectively reviewed Ignatian and Jesuit sources to identify features from that heritage that speak to Jesuit identity in the context of a community service organisation.

In Chapter Seven, 'Action', I brought the three sources of knowledge – personal, Ignatian and Jesuit – into dialogue with each other. The purpose of that reflective process was to synthesise and enrich my findings in order to address my primary and secondary research aims. This process has allowed me to make a number of new contributions to knowledge, practice and research methodology.

The praxis that I develop in this thesis comes from my vantage point as a laywoman, a social worker with more than four decades engagement in the community sector, a practitioner of Ignatian spirituality, and a leader of a Jesuit organisation for nearly twenty years. My methodological approach has allowed me to generate new knowledge, which I specify below, and I offer the fruits of my experience and study in the hope that they might be of use to others, both within the Society of Jesus and the broader community sector. Specifically, I hope this research contributes to some form of action. This might take the form of simply generating discussion and reflection regarding

the challenges I identified or the elements and organisational identity model I developed. It might encourage others to review their existing practice models with a view to enhancing them, or it may act as a prompt for others to adopt aspects of my findings and tailor them to their contexts.

Contributions to Knowledge and Practice: Jesuit Enterprise and Community Sector

As a practitioner, my aim has been to make a contribution to both knowledge and practice. It is important to stress that the *theory* of Jesuit identity developed in this thesis (for instance, in the thematic analysis of Ignatian and Jesuit heritage that grounds the elements and models I develop) has emerged from experience that has been reflected on with the eye, mind and heart of a *practitioner*. This applies to the following contributions to knowledge and practice pertinent to the Jesuits or others in the community sector.

Identification of Elements for Jesuit Identity in Community Service Organisations

Chapter 7 identified six elements from Jesuit heritage that speak to Jesuit identity of a community service organisation: *love*, *oneness*, *gratitude*, *solidarity*, *magis* and *discernment*. In addition, six features were distilled for each element. These elements provide a value base from which to build organisational responses to address injustice and respond to people in need. This offers the Jesuits and others working within this tradition an operational approach to inform their efforts to deliver on their mission and social purpose.

While this thesis did not set out to test the *central*, *distinctive* and *enduring* criteria used to identify attributes critical to an organisation's identity (Albert & Whetten, 1985), these criteria provided useful guidance in my examination of personal, Ignatian and Jesuit sources of knowledge. Reviewing material spanning nearly 500 years provided a rare opportunity to observe these organisational identity attributes across eras and to consider how they might contribute to the longevity of the Society of Jesus. My study pointed to the value of this combination of elements, highlighting that *magis* and *discernment* work together to ensure that those walking in this tradition remain free, available and responsive to the service of a greater purpose relevant to their context and circumstances. When this dynamic is honoured, it ensures vitality, freshness, relevance, timeliness and agility, which, somewhat paradoxically, ensures its continuity. An example from my own experience is the exercise of 're-imagining' Jesuit Social Services, where the organisation draws on its heritage to discern its direction, relevant for the times, and evolves accordingly.

Articulation of Way of Proceeding Framework Comprising Features for Jesuit Identity

By providing a mechanism to ensure alignment between high-level, aspirational statements and what is done in practice, the Way of Proceeding framework makes a valuable contribution to the practice of fostering Jesuit organisational identity. Its particular value is that it facilitates coherence within and across all aspects of organisational activity, further embedding this identity. This simple construct, with the three interdependent domains of Human Spirit, Practice Framework and Business Processes, is an invaluable tool for strategic and practical purposes. A significant contribution from my study was the identification of numerous features from across the three sources of knowledge that apply to these domains, further strengthening this framework.

My study demonstrated the broader application of the framework beyond Jesuit organisations. It did this by articulating the three domains in an organisation – its people, practice, processes – which must be considered in any attempt to ensure a coherent organisational identity. Further, by grouping the various features within each domain under themes that can be applied to other community service organisations (such as *our understanding*, *fundamentals*), my study pointed to how the framework can be adapted by others. For example, a community service organisation can undertake its own exercise of naming the particular features in each domain, and under each theme, that reflect its identity.

Articulation of 'One Foot Raised' Image to Capture the Jesuit Way of Being in the World

I analysed the findings that emerged from the three sources of knowledge and identified the six elements that speak to Jesuit identity. On reflection, I saw that the essence of the *one foot raised* image is crystallised in the *magis*/*discernment* dynamic. Having distilled its particular meaning that speaks to a Jesuit way of being in the world, I incorporated this powerful tool into my model. While use of this image is limited to a Jesuit context, given that it uses Ignatius as an identity referent, in that context it has enormous power. The significance of this contribution is that by naming the *magis/discernment* dynamic and applying it to the quote from Ignatius about living with *one foot raised*, I have elevated a powerful image from Jesuit heritage that, like any good image, is effective because of its capacity to immediately convey meaning, while yielding more insights over time. Its value also lies in the fact that it suggests how an individual can be in the

world (in a more tangible way than the Way of Proceeding framework or the Tree Model are able to), yet it can also apply to the organisation as a whole.

Development of the LOGoS Tree Model and Schema to Foster Jesuit Identity

To achieve my primary research aim, I developed the LOGoS Tree Model for fostering Jesuit identity of a community service organisation in a contemporary context. The significance of this contribution is that Jesuits and their colleagues who seek to establish initiatives in line with their social purpose now have a roadmap to assist them in the design, development and management of such enterprises. This addresses their concern to ensure the identity of their organisations. The specific value of the LOGoS Tree Model is that it is steeped in its Jesuit essence at every level, incorporating and applying findings from my research – the elements, the Way of Proceeding and the *one foot raised* image – which are all drawn from Jesuit heritage. In parallel, I articulated a schema that supports the LOGoS Tree Model by spelling out the relationship between its key components as demonstrated in the model: Foundations, Response, Purpose, Operationalisation, Approach, Guiding Principle and Process. The creation of this operational model that is Jesuit in essence opens the way for the further commitment and investment in such enterprises by Jesuits and colleagues.

Articulation of the LOGoS Tree Model and Schema for the Community Sector

My study has made a valuable contribution to the community sector by adapting key findings for use beyond the Jesuit enterprise. The significance of this for community service organisations struggling to operate from a strong values base is that the model and its constituent parts are informed by a deep heritage, yet lend themselves to application in a variety of contexts. A key contribution from my study is the articulation of a set of eight principles, distilled from the LOGoS Tree Model, that provides organisations with a clear guideline to assist their efforts to foster organisational identity in their settings. To ensure their broad application, these principles have been stripped of their overtly Jesuit character. Another contribution is the specification of the components of the schema – Foundations, Response, Purpose, Operationalisation, Approach, Guiding Principle, Process and Way of Proceeding – that can assist organisations to clarify and fulfil their purpose. By articulating the schema in non-religious language, my study has provided a version that can be used directly by others, or that might simply provide an example of how it can be adapted for different settings. Further, the identification of the

three principles at the heart of the Way of Proceeding framework facilitates its use by others in the community sector.

Contributions to the Organisational Identity Field

In the Literature Review, I identified scholars who argue the importance of a strong organisational identity to buffer the organisation at times of challenge (for example, Brilliant & Young, 2004). My experience during the exercise of 're-imagining Jesuit Social Services', which was initiated in response to the encroachment of neoliberal policies and practices in our sector, supports this claim. Further, it demonstrates that beyond simply supporting the organisation to withstand a difficult time, the process of actively drawing on Jesuit heritage when the organisation was under stress proved to be a self-reinforcing exercise that further strengthened organisational identity.

This study supports the proposition put forward by Haslam, Cornelissen and Werner (2017) that root metaphors, more than being figures of speech, are 'root modes of thinking' (p. 320). They elicit new understandings beyond what emerges solely through theory. This is demonstrated in my research through the use of the tree image. It acted as a root metaphor, stimulating new insights that I then incorporated into the tree model for organisational identity that I developed.

In Chapter 7, when I presented my findings, I discussed how my model contributes to matters that are at the centre of key debates in the field. The LOGoS Tree Model for organisational identity supports the convergence of perspectives that is emerging in the literature in relation to both the ontology and epistemology of organisational identity. With regard to the former, the sharp demarcation between entity versus dynamic flow is becoming blurred (Gioia & Hamilton, 2016); in the latter, convergence between social actor and social construction perspectives is challenging the stand-off that has dominated the field for decades (Gioia & Hamilton, 2016). The LOGoS Tree Model, as an ecological image, reflects the understanding that organisational identity has entitative status (the tree) and is, at the same time, in a constant state of flow, and maintains identity by ongoing refinement and recalibration (the organic process of a living organism). The LOGoS Tree Model also supports the dynamic between sense-giving (social actor perspective) and sense-making (social construction), with the roots performing the former task and the leaves the latter. This contribution to the field is significant beyond the knowledge generated; importantly, the lessons have been operationalised in a model that has practical application. This has the

potential to have an impact at numerous levels, including supporting the Jesuits and the community sector more broadly to fulfil their purpose.

In my review of organisational identity literature, I also identified two methodological issues to which I now return. The first concerns the call for more embedded research in this field in order to gain greater understanding of the topic, rather than accepting long-held assumptions about organisational identity (Alvesson & Robertson, 2016). The second relates to the concept of 'pragmatic realism' (Watson, 2016, p. 126), which prioritises theories and approaches that are useful in real-life situations. At the outset, I took these points as support for my ongoing deep engagement in the organisation that was at the centre of my research and for the choice of autoethnography as my methodology. I anticipated that my approach would allow me to draw on my experience as a practitioner (of social work, of leadership and of Ignatian spirituality) to articulate pragmatic and useful theory regarding how to foster organisational identity. Experience confirms my initial view that my embedded position in Jesuit Social Services, and my use of autoethnography, have allowed me to gain deep insight into the topic that would not otherwise have been possible.

A further contribution related to methodology (beyond the organisational identity field) is that my research demonstrated the value of autoethnography in accessing personal material in order to build knowledge. In particular, my methodology demonstrated how an autoethnographic approach to the data can form one aspect of the study, sitting alongside other approaches, such as the reflective review of source material and more conventional treatment of, for example, the context and literature. My use and adaptation of the Ignatian Pedagogical Paradigm to both structure the thesis and guide the approach to my personal data provided a framework for this approach. Further, it demonstrated a new application of the Ignatian Pedagogical Paradigm. While it has been considered compatible with action research (Coghlan, 2005), to my knowledge the paradigm has not been used in the comprehensive way demonstrated in my study.

Beyond the key ontological, epistemological and methodological debates in the field, my review of the literature identified a number of other issues to which my research makes a contribution. The first relates to the topic of multiple identities. Albert and Whetten (1985) contend that organisations may have multiple identities, with Young (2001) suggesting this is common in the not-for-profit sector. While seen as a strength in some circumstances, it can manifest as a weakness if at any point in time one identity is not prioritised (Brilliant & Young, 2004). Elfving and Howard (2018) contribute to this discussion by introducing the concept of layered identity, comprising core and collective

identity. The former is understood to be strongly connected with the organisation's vision and not subject to change; the latter is understood to be more open to change and suited to supporting stakeholder engagement.

In my situation of straddling the community sector and Jesuit worlds, I often felt pushed to choose which identity to prioritise, but my experience suggests that it is not necessary to accept this binary logic. Rather than hybrid identities, or even layered identities, I suggest that Jesuit identity, by its nature, lends itself to being adapted and embedded in and across an organisation, which then operates with one identity that is given particular expression according to context and circumstances. This understanding may have similarities with Albert and Whetten's (1985) holographic identity form, which refers to an organisation's having dual identities, with each organisational unit expressing both identities (for example, religious and education identities), contrasting with the ideographic identity form, where different divisions express different identities. However, my insight is that rather than aiming to give expression to both identities or juggling multiple identities, there is a way of being a community service organisation that is Jesuit – that is, in expressing its Jesuit identity across all its activity. The LOGoS Tree Model supports the idea that identity is infused throughout the organisation.

Examining this point further, I note my earlier suggestion that the combination of *magis* and *discernment* might contribute to the Jesuit order's longevity; I am now considering an extended purpose that it might serve. I contend that the guiding principle of *magis*, with its inherent call to be flexible and open for the purpose of responding more fully, is core to Jesuit identity. So, too, is the process of discernment. These elements work together to ensure fidelity to the organisation's foundations and purpose, while remaining free, flexible and open to change. In this way, I suggest that Jesuit identity can be tailored for particular circumstances beyond the religious institute of the Society including, for example, the context of a community service organisation. This finding represents a significant contribution to knowledge and practice as it sharpens the focus on the key *magis/discernment* dynamic that facilitates the establishment, fostering and maintenance of Jesuit organisational identity. The decreasing number of Jesuits and the increasing number of laypeople leading and staffing Jesuit organisations makes it imperative to find a way to achieve this. My model fulfils this purpose in assisting the Jesuits to enhance their impact in line with their social mission.

In putting forward this idea, which, in fact, I have been engaged in operationalising over a number of years, I do not seek to minimise the very real demands associated with pursuing this approach. This includes managing various stakeholders'

expectations about the organisation's identity – for example, the Jesuits, staff, sector, funders, donors. While challenges exist in taking this path, it has been recognised that leading in a way that bridges boundaries has effects beyond the organisation (Yip et al., 2010). As a leader of a Jesuit organisation that casts itself as a social change organisation, this transformative approach appeals to me and reinforces my commitment to lead in this way.

In the Literature Review, I also addressed the topic of communicating organisational identity, referring to the role of 'saying, showing, and staging' (Schinoff, Rogers, & Corley, 2016, p. 222) and highlighting 'staging' as an effective way to allow organisational members to have a direct experience of the identity. A strong link between 'staging' and 'felt knowledge' – a feature that emerged in my review of Ignatian heritage – also provides support for this aspect of communication, particularly when it is part of the regular routine of organisational life. The Ignatian tradition seeks to engage the whole person, including the imagination, and acknowledges numerous ways of 'knowing'. In my autoethnography, I recounted how this is encouraged through regular reflective practice, including time for reflection at the beginning of meetings, Orientation sessions, and All Staff Days. The latter occasions provide staff and program participants with the opportunity to give witness to the organisation's identity through sharing stories and music. This avoids didactic modes of communication, extends the number of actors who can lead on communicating identity and provides the opportunity for staff to have an emotional and bodily experience of identity. According to Harquail and King (2010), 'staging' allows for the inclusion of 'a range of embodied and abstract knowledge' (p. 1621), which provides 'substantiation' for identity features.

The importance of creating space for and honouring experiences and insights that resist easy classification or definition emerged strongly in my autoethnography, and also in my review of Ignatian and Jesuit heritage. This includes spiritual experiences, embodied cognition and other ways of knowing. Artefacts and images, such as the *one foot raised* image and the tree, have been shown to be powerful tools to engage the senses and provide a material representation of organisational identity beyond words and written material (Watkiss & Glynn, 2016).

Another issue foreshadowed in the Literature Review, which also emerged strongly in my autoethnography, was the issue of power in relation to whose claims about organisational identity dominate. My own experience resonates with those scholars who argue that organisational identity claims become arenas for resistance, control and hegemony (for example, Brown, 2006; Manuti & Maninni, 2013). I saw this played out

in relation to Jesuit Social Services' identity. On the one hand, I encountered ongoing suspicion and doubt regarding the authenticity of the organisation's identity. This was reflected in the frequent question, 'How Jesuit *is* Jesuit Social Services?' From my side, I encouraged the genuine engagement of staff with Jesuit identity by ensuring it remained accessible and invitational, and resisted attempts from those outside the organisation to impose what I viewed as a formulaic approach to fostering Jesuit identity.

Others in the Jesuit enterprise are also grappling with this issue. McCallum and Horian (2013) questioned whether work in a higher education setting needs to be cloaked in religious language. They came down on the side of 'value based principles rather than explicitly religious language' (p. 6), and concluded that proof of the gospel inspiration is best expressed in the person's 'decisions, actions, and commitments to society' (p. 7). In this contested space, I believe my model for fostering Jesuit identity provides a way forward to engage people from all faith backgrounds, and none, in values-based endeavours within an organisational setting.

Limitations

In choosing an autoethnographic methodology, I was aware of the debate among scholars about where on the emotive-analytic continuum an autoethnography should be situated (Anderson, 2006). I considered the arguments regarding possible limitations of research located at either end of the continuum and ultimately chose a 'moderate' stance as described by Wall (2016). I achieved this stance as a result of how I treated my personal data in Chapter 5 – namely, choosing processes and presenting a product that align with the emotive end of the continuum, while using a structured framework to consider and present this material.

Consistent with an approach that situates autoethnography at the emotive end of the spectrum, I drew on my personal experience, including from my spiritual life, seeking to make overt my insights and associated meaning-making (Bochner & Ellis, 2006) in relation to the research topic. I chose this approach because I believed it was the best way to achieve my research aim. Nevertheless, it presented some challenges that I had to manage. Over the years, I have had a number of spiritual experiences that were highly influential in shaping my understanding and, ultimately, the model I developed, but such experiences tend to be inscrutable and ineffable in nature. In including material of this nature, I was concerned to ensure it was accessible (Witkin, 2014a). I endeavoured to manage this by being selective in what experiences I chose, and I always situated these in

a narrative that spelled out how they contributed to the knowledge that informed my model.

Bearing in mind the criticisms emanating from the analytic end of the continuum regarding methodological rigor (Anderson, 2006), I adapted the Ignatian Pedagogical Paradigm to provide a systematic way to approach the data and to shape the overall structure of my thesis. The Ignatian Pedagogical Paradigm also ensured that critical reflexivity (see Lietz, Langer, & Furman, 2006) was strongly embedded in my research. The Ignatian reiterative process of reflection (reflecting on the context, on one's experience, on what action to take, and then reflectively evaluating knowledge gained to date) created a helpful discipline in approaching my personal data. At times, however, my challenge was how to present this material in a way that avoided repetition and adequately distinguished the content in each component of the paradigm, given their potential overlap. I managed this by ongoing assessment and refinement of the content of each section against its main purpose as set out in the paradigm. Also, I chose to limit use of the Action and Evaluation sections to the conclusion of each Act, and I varied my presentation of material by using tables to sharpen the focus on key points that were emerging in the Evaluation sections, rather than relying on narrative text.

In addition, while honouring a reflective approach to my research overall, I structured my thesis to allow for material in the various chapters to be treated in different ways, from the more conventional presentation of Methodology (Chapter 2), Context (Chapter 3) and Literature Review (Chapter 4), through to a reflective review of Ignatian and Jesuit sources (Chapter 6) and the more emotive presentation of personal data (Chapter 5).

The broad scope of this study has benefits but also limitations. My research demonstrated the interconnection between the Way of Proceeding domains of people, practice and processes; however, I did not have the opportunity to fully explore the application of specific elements and features from Jesuit heritage (such as *gratitude*) to individual domains of organisational life (such as Business Processes). Further, I recognise that my findings would be enhanced by demonstrating in detail how these elements, once applied to a specific domain, could be operationalised. On numerous occasions, I was drawn to address this by narrowing but deepening my focus in a particular area, but felt the breadth of topic did not permit this. On these occasions, I refocused on the research aim of articulating the model and associated elements, recognising that others will be able to use and apply my findings and apply them in their settings. As a guide, I provided examples in appendices of how Jesuit Social Services

had undertaken this task (for example in the *Staff Orientation Handbook*, *Our Foundations*, and *Program Logics*).

Finally, a potential limitation of my research is that I explored the topic of organisational identity from my viewpoint of organisational leader only. I am conscious that the experience of other key players, such as staff, volunteers or the board, was included only indirectly. These limitations point to areas for further study.

Areas for Further Study

My review of the literature unearthed very little research in relation to Jesuit organisational identity, specifically in relation to the community or social sector. My study has helped to address this gap by providing a model for fostering the Jesuit identity of a community service organisation, inclusive of the elements that speak to this and a framework for its operationalisation. Having developed this model, I see benefit in further research to test its application in other settings and examine its effectiveness.

In addition to examining model-wide application of the LOGoS Tree Model, an opportunity for further research could be to examine how particular components of the model, such as the elements, could be operationalised in each of the three domains of the Way of Proceeding framework and the impact this has on fostering organisational identity, from high level concerns such as governance and strategic planning through to more operational matters such as financial and resource management, human resources and quality processes.

In keeping with my research topic, I examined documents from Ignatian and Jesuit heritage with an eye to identify elements relevant to the community sector. An area for further study could be the examination of these documents with a broader lens to identify, for example, features relevant to the Business Processes domain of an organisation. McCallum's (2014) assertion that the *Constitutions* could be considered an 'organisational blueprint' for 'administrative policies and structures' (p. 13) suggests that they could be studied to identify material aligned with this domain – such as governance, recruitment of personnel and management of resources – that could be usefully adapted and applied to our sector.

Another area for further study is examining the role of various key stakeholders, such as staff, volunteers and board members, in fostering Jesuit identity. The board, for example, has responsibility for setting the strategic direction of the organisation, recruiting the CEO, and making decisions about how resources are allocated. As such, it would seem critically important that board members understand and promote the

organisation's Jesuit identity in undertaking these responsibilities. Further investigation of this topic, including how and to what extent this translates to shaping the day-to-day identity of the organisation, could build knowledge about the locus of influence in fostering organisational identity. It might shed light on how the relationship between the board and the CEO can be optimised for the purpose of ensuring Jesuit organisational identity. It might also provide lessons for how best to recruit, induct and 'form' board members.

My reflection on the community sector, from this vantage point, confirms the urgent need for organisations to embrace a values-based identity. The insidious encroachment of neoliberalism into the community sector continues, highlighting the benefits of knowing 'who you are', of understanding your foundational values, how they link to your purpose, and how to operationalise this across the domains of people, practice and business processes. I developed the Way of Proceeding framework some time before I applied it at Jesuit Social Services, suggesting that it has application in other settings. I believe it is a useful framework that organisations might adapt for their circumstances, drawing on their particular heritage or values to influence all domains of their activity.

Additionally, the process of engaging more deeply with Jesuit heritage and its translation into our own situation at Jesuit Social Services has reinforced its value and adaptability. Jesuit Social Services staff come from numerous faith backgrounds, and none, yet they embrace the organisation's identity and its application in their practice. This emboldens me to suggest that other organisations might be open to adopting and adapting the LOGoS Tree Model for use in their organisations. It would be instructive to examine if this model and its various components could translate successfully to an organisation that is non-Jesuit, or non-faith based, and what benefits might ensue.

Organisational identity scholars might be interested to examine the LOGoS Tree Model in order to ascertain its value as a model for understanding organisational identity. Such research might yield insights about the ontology and epistemology of organisational identity, especially the convergence of perspectives that emerged in the literature, which is also supported by my research.

Personal Reflection

The experience of writing a thesis is challenging regardless of the chosen methodology. In preparing to undertake an autoethnographic approach, I read about the possible impacts that using this methodology might have on me (Chang, 2008; Ellis, 2007; Wall,

2016). It has definitely been a mixed experience. As I reviewed my life, there were moments of embarrassment, shame, confusion, fury and despair; but as I recalled the numerous gifts I have been given, my research became an exercise of love and service.

In relation to the Jesuits, my insider/outsider status (Mercer, 2007) brought challenges that I had to manage. It afforded me privileged insight that I sought to deal with respectfully – not unlike a visitor at a family dinner who is trusted enough to witness some of the strengths, challenges and intriguing inner workings of a family but then feels obliged not to gossip about what she's seen or heard. My outsider status undoubtedly allowed me to see some things with a clear eye. These insights strengthened my desire to offer the Jesuits a way to further their commitment to 'faith doing justice'. They underlined the necessity of doing this in a way and through implementation of a model that is robust, grounded and theorised; that draws on social work and organisational identity fields; and that clearly demonstrates its Ignatian and Jesuit heritage. Also, as a way of honouring the experiences of the people we walk with and assist every day, and my work colleagues and Jesuit friends around the world who work tirelessly for justice, these insights propelled me to name the barriers I have identified to the pursuit of this mission.

From this vantage point, it strikes me that my efforts over many years to bridge worlds have been an attempt to hold the space for something new to emerge. And with that understanding, comes the insight that my research is a continuation of that effort. It has been a 'culture-making' (Pelias, 2011, p. 660) exercise, challenging both worlds I straddle, as, inevitably, both privilege their own cultures. It has been a sense-making exercise (Bochner & Ellis, 2006): as I wrestled with elements of my story, I recognised within it dominant and less privileged stories. Looking through a feminist lens, I was alert to the questions, Whose voice is being heard, and whose knowledge is being privileged? (Olesen, 2011). And in a desire to make meaning of this experience, I often asked myself, 'What could be different because of what we have learned?' (Wall, 2006, p. 148). It has also been a political exercise, carrying 'an implicit or explicit call to action' (Peilas, 2011, p. 660). I want my research to matter in everyday life. I want to change the world. And I want to start with the Jesuits, and with my sector.

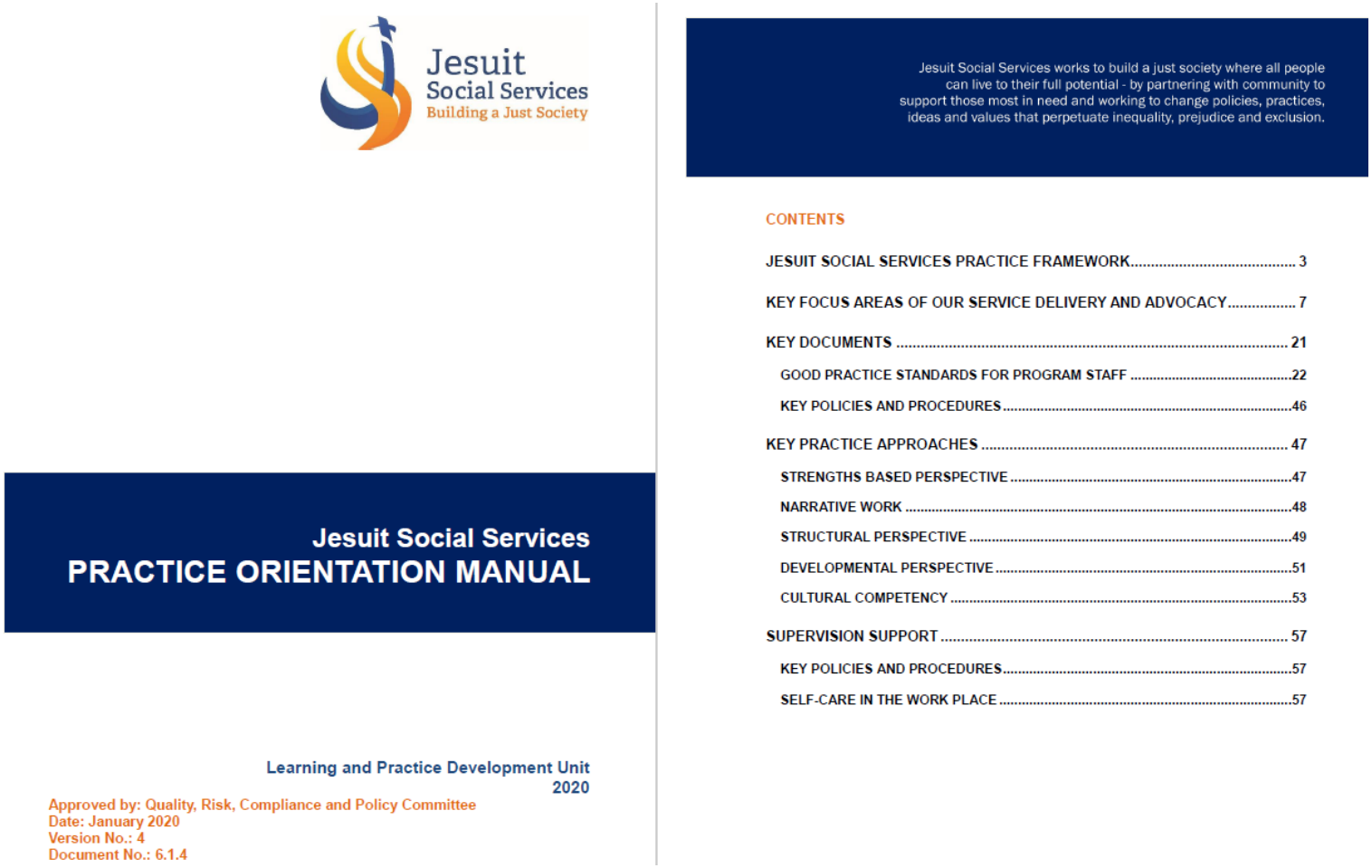
Conclusion

I chose my research aim *to articulate a model to foster the Jesuit identity of a community service organisation in a contemporary context* because my experience had demonstrated the value of such a model. I hoped it would have value to others. In particular, I

anticipated it might be useful for the Jesuits and also for the community sector, the two worlds I straddle, in contending with the particular issues they face. In concluding my research, I now dare to claim this is true.

The autoethnographic process clarified that the model is a fruit of my experience. It underlined the interconnection between autoethnographic, feminist and Ignatian approaches, which propose that interior, embodied knowledge matters; that the personal is always political; and that the acid test is action. And so, I bring the voice of a layperson, a woman, a social worker to the Jesuits, putting an honest, humble offering before them: their own treasure. ‘Look, please look. The world needs you.’ And I bring that same voice to the community sector, putting before them their deep purpose. ‘Look, please look. You are not a business. You are here to love and serve.’

APPENDIX A: Practice Orientation Manual, Jesuit Social Services, Contents Page



Jesuit
Social Services
Building a Just Society

Jesuit Social Services works to build a just society where all people can live to their full potential - by partnering with community to support those most in need and working to change policies, practices, ideas and values that perpetuate inequality, prejudice and exclusion.

Jesuit Social Services
PRACTICE ORIENTATION MANUAL

Learning and Practice Development Unit
2020

Approved by: Quality, Risk, Compliance and Policy Committee
Date: January 2020
Version No.: 4
Document No.: 6.1.4

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Source: Jesuit Social Services. (2020). *Jesuit Social Services Practice Orientation Manual* [Unpublished document]. Learning and Practice Development Unit, Jesuit Social Services, Melbourne.

APPENDIX B: Staff Orientation Handbook, Jesuit Social Services, Contents Page

Staff Orientation Handbook
August 2020

Jesuit
Social Services
Building a Just Society

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Source: Jesuit Social Services. (2020). *Staff Orientation Manual* [Unpublished document]. Jesuit Social Services, Melbourne.

APPENDIX C: Program Logic Diagrams

Jesuit Social Services – Organisational Level Program (Portfolio) Logic

Context

Situation: A significant proportion of Australians live in situations of social and / or economic disadvantage that prevent them from living to their full potential

Complication: While current policy, program and community based approaches aim to respond to the needs of those groups they often are not sufficient to break the cycle of disadvantage and address underlying inequality, prejudice and exclusion

Response: Jesuit Social Services works to build a just society where all people can live to their full potential by:
- Partnering with community to support those most in need and
- Working to change policies, practices, ideas and values that perpetuate inequality, prejudice and exclusion

Program Objectives

Target Group(s):
We work with:
- Those most in need - individuals, families and communities
- The broader communities in which we live and
- The service providers, decision-makers and institutions that affect us

Focus Areas:
We strengthen and build respectful, constructive relationships for:
- Action – by partnering with people most in need and those who support them to address disadvantage
- Education – by providing access to education, life-long learning and development
- Advocacy – by building awareness of injustice and advocating for social change

Target Outcomes:
- Respect and value self and others (recognise **potential**)
- Affirm goals / **aspirations**
- Build **capacity** for each person to realise their full potential
- Recognise and build on experience, skills and **capabilities**
- Access **opportunities** to participate in, community, learning and work

and through that
- Promote **social justice**

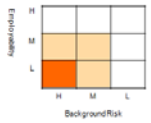
Participant Profile

Target Groups:
- People, families and communities in need experiencing socio-economic disadvantage, isolation or exclusion
- The broader communities in which we live
- Service providers, decision-makers and institutions that affect us

- We focus on supporting people who are socially and / or economically disadvantaged (or at risk of that) with complex needs who are excluded / disengaged from mainstream services.
- In particular we focus on:
  - Justice - people Involved in (at risk of involvement in) the justice system
  - Settlement & Community Building
  - Mental Health - People with multiple and complex needs
  - Education & Employment - People with multiple barriers to sustainable employment
- Most program participants:
  - Are disengaged from mainstream services, education and employment
  - Experience multiple risk factors that impact their ability to engage with mainstream services

Health: Physical / mental health; Acquired brain injury; Drug / alcohol use; Disability; Trauma	**Housing / Home Environment:** Unstable housing; Homelessness / dislocation; Unstable home / family environment; Family dysfunction
Background Experience: Child protection; Youth or adult justice; Immigration / forced migration	**Socio-economic Status:** Social isolation; Early school leaving; Un- / under-employment; Entrenched socio-economic disadvantage

Many face significant challenges in engaging in mainstream education, training and work



(Current) service coverage :

NSW	Western Sydney Bourke
VIC	Northern & Western, Eastern and Southern Metro Melbourne
NT	Alice Springs Tennant Creek

Approach

We run a portfolio of programs designed to:
- Work with those in need at an individual, family and community level to address disadvantage and
- Encourage community engagement on social issues and support broad based social, policy and system change

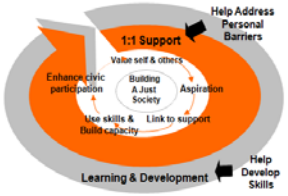
Way of Working:
We partner with the people we work with to help them to see what they are capable of, set goals, develop skills and take up opportunities to realise their full potential

Building relationships is at the heart of that work, it requires us to act in a way that is welcoming, discerning and courageous

We tailor what we do and how we work to the needs of those we partner and work with

We use a **holistic, relationship based support model** to provide 1:1 support to those in need

We **combine that support with learning and development** to help people to live to their full potential



Program Portfolio

Action — **ACTION** partnering with people most in need and those who support them to address disadvantage (including individual advocacy)

Education — **EDUCATION** providing access to education, life-long learning and development

Advocacy — **ADVOCACY** building awareness of injustice and advocating for social change

Youth and Adult Justice Programs

Programs working with young people at risk of entering the justice system and people in the youth and adult justice systems that provide intensive 1:1 support and work with people and their families to help them to (re) engage with their community and access support / services that can help them avoid (further) involvement in the justice system

Prevention	Early Intervention	Transition / Support
Leaving Care Mentoring L2P	Group Conferencing Aboriginal CFJP	Youth and Adult Justice, AVAMP Housing, Perry House, Next Steps, Dillon House

Education, Learning & Development Programs

Programs working with people to help them to develop foundation skills and access education, learning and / or development opportunities to help them to live to their full potential and participate more effectively in community, learning and work

Personal Development	Foundation Skill Development	Vocational Skill Development
TOE	Jesuit Community College	Jesuit Community College

Social Enterprise Programs

Social enterprise programs working with people to develop work readiness skills and help them to transition into further training or work

Ignite Cafes, The Store

Community Programs

Community programs working with people, families and communities to support individual and community development by helping them to access services and information, build skills and develop and engage in community networks, systems and activities

Service Provision	Community Development
Settlement Program – St Albans & Flemington Early Intervention Youth Boot Camp, Alice Springs Men's Behaviour Change Program, Alice Springs	Central Australia and Northern Territory programs Bourke, Western Sydney Settlement Program – St Albans & Flemington

Volunteering

Programs working with community members and organisations to build community awareness of social issues and encourage community participation and volunteering to support those in need

Jesuit Volunteers Workplace Inclusion Program Just Leadership

Specialist Counselling & Support Programs

Clinical counselling and therapeutic programs working with people and families with complex / specialist support needs

ConneXions Support After Suicide

Research

Social issue research to inform program development, best practice program delivery, staff training and development and advocacy (including program evaluation)

Best Practice Dissemination

Documentation and internal and external dissemination of program experience and practice learnings

Staff & Sector Training & Development

Formal and informal staff training and development and sector based training and exchange (

Advocacy

Public advocacy to build awareness, understanding and promote social change in relation to social justice

Outputs

Target Participation Profile:
(unless otherwise indicated % based on # active participants)

Registered:
Active:
(breakdown by participant group and program type)

in multiple programs

Average support period mths
Participants support > 6 mths %

Pathways / Support Planning Statistics:
Support plans completed 100%
Transition plans completed %

Referral & Support Statistics:
Referrals made %
(breakdown by type)

Outcomes

	Valuing Self & Others	Affirm Goals & Aspirations	Linking to Support to Realise Full Potential	Using Skills & Building Capacity	Enahncing clic participation
	Potential	**Aspiration**	**Capacity**	**Capability**	**Opportunity**
Individuals, families and communities in need					
Individual	• Positive view of self / identity / potential • Increased self awareness / understanding / ownership of personal issues • Positive attitude toward / relationship with (significant) others	• Perceived capacity to influence future • Positive life goals / aspirations • Positive view of future	• Strengthened personal & professional support networks • Increased help seeking behaviour / use of appropriate support services • Improved access to stable housing • Improved physical & mental health / wellbeing • Improved personal safety • Reduced risk taking/ anti-social (criminal) behaviour	• Improved personal skills • Improved general life management skills • Improved foundation employability / work readiness skills • Improved vocational skills • Improved capacity to manage	• Increased access to appropriate support services / information • Increased access to education, training & work • Increased opportunity to participate in local community / civic activity
Family	• Increased awareness / understanding / ownership of family issues / dynamics • Positive attitude toward / relationship with family members	• Perceived capacity to influence family issues • Positive family goals / aspirations • Positive view of future	• Strengthened personal & professional support networks • Increased help seeking behaviour / use of appropriate support services • Improved access to stable housing • Improved family function • Increased family stability • Improved financial security	• Improved management family issues / dynamics • Improved parenting skills	• Increased access to appropriate support services • Increased access to education & training • Increased opportunity to participate in local community / civic activity
Community	• Increased awareness / understanding / ownership of community issues • Positive view of community / identity / potential • Positive attitude toward / relationship with other community members	• Consideration of community issues • Perceived capacity to influence community issues • Positive community goals / aspirations • Positive view of future	• Strengthened community networks • Increased help seeking behaviour / use of appropriate support services • Improved community safety • Improved community cohesion	• Improved community engagement / governance / development skills to address community issues	• Increased access to appropriate services / resources • Increased access to education & training • Increased opportunity to participate in local community / civic activity
The broader communities in which we live					
Community	• Increased awareness / understanding / ownership of social issues • Increased empathy / positive attitude towards those in need	• Consideration of social issues • Perceived capacity / responsibility to influence social change	• Reduced negative stereotyping • Increased involvement in social issues / volunteering • Increased access to volunteering / other opportunities to support those in need	• Improved capacity to engage with others (provide support to those in need)	• Increased access to volunteering / other opportunities to support those in need
Service providers, decision makers and institutions that affect us					
Society	• Increased awareness / understanding / ownership of social issues • Increased empathy / positive attitude towards those in need	• Consideration of social issues • Perceived capacity / responsibility to influence social change	• Strengthened, evidence based policy frameworks • Increased participation in community, learning and work • Reduced negative stereotyping / discrimination • Improved social cohesion • Improved social inclusion / equity	• Improved capacity to develop evidence based policies • Improved capacity to design and deliver quality services to support those in need	• Increased access to social research / best practice information • Improved access to sector training and development • Increased opportunity for cross-sector dialogue / collaboration

Program Logic – Settlement Programs

September 2019

Context

Situation

People who are newly arrived in Australia have a range of needs associated with settlement including:

- Limited English language
- Limited understanding of Australian systems, resources and supports that are available
- Isolation from mainstream Australian community life
- Challenges associated with adapting to a new country and community

Barriers

Mainstream services don't provide the targeted, medium term supports required to meet the specialised needs of this cohort. There are limited opportunities for newly arrived communities, to strengthen their capacity to navigate mainstream services.

Need

There is a need for a flexible, settlement service that:

- Assists members of newly arrived communities to settle in Australia and take advantage of the opportunities available to them while retaining links to their cultural history and community.
- Develops individual and community capacity
- Works from a community development perspective
- Works alongside identified communities to address collective issues
- Reduces barriers, builds capacity and strengthens connection to the broader community

Participant Profile

Eligibility Criteria

People who:

- Humanitarian entrants and family stream migrants W
- Have been in Australia for less than 5 years.
- Have low proficiency in English language skills
- Requiring assistance with one or more of the following:
  - Language services
  - Housing
  - Civic participation
  - Employment
  - Health & Well being
  - Family & social support
  - Education & training
  - Transport
  - Justice issues
- Are socially and economically disadvantaged

Program Objectives

- To equip and empower eligible clients and communities to address their identified settlement needs in order to improve social participation, economic well-being and community connectedness.
- To build partnerships (and communities of practice) and referral channels to assist participants to achieve long-term outcomes of self-reliance and equitable participation in Australian Society.

Social Impact

People flourishing in a web of relationships

- People exist in a web of relationships that are healthy, supportive and life-giving, and are connected to education, skills and opportunities to make a living. The ecology is respected and cared for.

Communities empowered to participate and create positive change.

- People and communities are connected to opportunities and resources, appropriate to their culture and history, to influence and achieve positive social change.

Hearts minds and systems changed towards love and justice.

- There is reduced prejudice and policy and legislation changes for a more just society. New solutions are adopted by governments and partners to increase social, gender and environmental justice.

Settlement Program

Casework Support

Intake

- Assess for eligibility
- Match to resources
- Allocate or refer out

Low or Medium Intensity Support

- Engagement & relationship building
- Information provision and advice
- Case management
- Referral and linking to specialist supports
- Practical support (e.g. filling out forms)
- Building confidence & self esteem
- Assisting to navigate generic service system
- Build independence in systems navigation
- Link to education, training and employment
- Mentoring and capacity building
- Empowering participants to self-determine their own lives.
- Ongoing assessment and review

Case Closure

- Review
- Onward referrals
- Documentation
- Close

Group Work

Single Session

- Identify community determined need
- Arrange and facilitate one-off information sessions in response to identified need.
- Strengthen community participation
- Evaluate and review

Multi-Session

- Building and maintaining relationships with community leaders
- Create opportunities for dialogue with communities to identify areas for development
- Identify community determined need
- Arrange and facilitate multi-session information sessions or courses in response to identified need (Series of six sessions).
- Strengthen community participation
- Evaluate and review

Ongoing

- Building and maintaining relationships with community leaders
- Create opportunities for dialogue with communities to identify areas for development
- Identify and respond to community needs for ongoing group work
- Provide ongoing support to established cultural and/or shared interest groups
- Strengthen community participation
- Monitor, review and evaluate groups

Stakeholder Engagement and System Influencing

- Building relationships with other providers
- Engage with local communities of practice and local government initiatives
- Building relationships with community leaders
- Partnership building with specialist services (internal and external)
- Advocate for systems and policy change

Social Impact

Outputs

People Flourishing

Target Participation Profile

250 participants receiving low intensity support casework (over 3.5 year contract)

250 participants receiving medium intensity support casework (over 3.5 year contract)

#100 care plans (across 3.5 year contract)

#80% of participants positively rate engagement with the program in relation to:

- Overall satisfaction
- Understanding of their issues
- Enhancing their capacity to self-manage

Communities Empowered

2 ongoing groups per annum

10 multi-session groups per annum

Hearts, Minds & Systems Changed

Participate in 4 community of practice forums per annum

Attendance at local service provider meetings

#Contributions (media and advocacy) to public debate related to settlement services

Participant Outcomes

Target Outcomes

- Valuing self and others
- Affirm goals and aspirations
- Linking to support
- Using Skills and building capacity
- Enhancing civic participation

Valuing Self & Others

- Positive view of self/identity/potential
- Increased self awareness/understanding/ **ownership** of personal issues
- Positive attitude toward/relationship with (significant) others

Affirming Goals & Aspirations

- Perceived capacity to influence/control future
- Positive life goals/aspirations
- Improved (positive view of future

Linking to Support

- Strengthened personal network
- Strengthened professional support network
- Increased help-seeking behaviour
- Improved physical and mental health/wellbeing
- Improved personal safety
- Reduced risk taking
- Reduced AOD use/improved AOD management

Using Skills & Building Capacity

- Improved personal & general life skills
- Improved foundation (employability) skills
- Self –discipline
- Routine
- Self direction
- Group participation
- Goal setting & planning
- Critical reflection/assessment
- Improved capacity to manage risk factors independently

Enhancing Civic Participation

- Access to appropriate support services/information
- Increased opportunity to participate in community activities, learning or work
- Transition into more structured learning & work
  - School/VCAL
  - CAE
  - TAFE
  - Work experience/peer mentor
  - Work placement
  - Casual/part time/full time work

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