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# The Charism Scale

## *Assessing the Characteristics of Marist Education in the Champagnat Tradition*

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### Abstract

Educational Charismatic traditions, like Marist Education in the Champagnat tradition, among many other charisms, are different ways of ‘enfleshing’ and ‘flavouring’ the Gospel of Christ. They are about the incarnation of the Christian message, a particular expression of what it means to be Christian within the context of one’s own time, place and culture. What are the characteristics, and particular emphases, of such ‘enfleshments’? The Charism Scale is a new empirical survey instrument designed to assist schools to explore the degree to which their foundational charisms exist and the way they take shape. The multi-variate attitude scale is based on five empirically confirmed dimensions to which various educational charismatic traditions respond in different ways. It is ‘in the mix’ that the particularities of each charismatic tradition emerge. This empirical data enables school communities to identify and strengthen the particular charismatic flavour they bring to the Catholicity of the school.

## Keywords

Educational charisms – spirituality – Catholic theology – recontextualization – empirical survey research – multivariate attitude scale – all stakeholders – Marist Schools Australia

## 1 Introduction

Study and research on particular spiritual traditions of known Catholic religious institutions is not new but the empirical mapping of spiritual traditions within the ever-evolving context of today is. Cook (2015, 69) notes that assessing a school's overall culture goes beyond a 'special feeling' and needs to be more rigidly evaluated so as to assist the school in monitoring the extent to which their particular charism is enhancing the quality of Catholic education of their school.

Research within the framework of the *Enhancing Catholic School Identity* (ECSI) project conducted by KU Leuven in Belgium since 2006 has shown that it is possible to assess the identity of Catholic schools by means of a variety of quantitative and qualitative empirical instruments (Pollefeyt & Bouwens 2014). Research into educational charismatic spirituality, and in particular the charism of Marist schools, was instigated by the Director of *Marist Schools Australia* (MSA) in 2015 as a work of collaboration with ECSI at KU Leuven. It was conducted between 2015 and 2021 through multiple trial rounds of Marist Schools in Australia and Ireland.

The focus of this research is to explore if the presence of a particular charismatic tradition could be empirically measured so as to indicate its particular charismatic flavour within the Catholicity of a school. The Charism Scale enables the leadership of schools to gather data over several years and provide empirically valid input for their consideration with respect to the further enhancement of their charismatic enfleshment of the Gospel as an expression of their giftedness for the Church as a whole.

The empirical research identified five distinct dimensions. Four universally applicable dimensions are constitutive of 'charism'; the fifth dimension focuses on knowledge and appropriation of the particular (in this case, Marist) charismatic spirituality.

The aim of this article is to inform the reader about the newly created empirical instrument. We will explain what it is and how it is constructed, and justify that it works. Next, we provide a demonstration of how the instrument can be

put to use in specific educational settings, such as Marist Schools Australia. This approach deliberately combines assessing and enhancing charismatic tradition, that both have scientific value and meaning, and always progress together.

## 2 Definition of 'Charism'

### 2.1 *The Origins of the Term 'Charism'*

The term 'charism' has a long history, and from a Christian perspective it is seen as a God-given gift to the community which is to be exercised for the overall good of the community. In the First Testament, the presence of various personal charisms can be discerned by focusing on the actions demonstrated by a range of biblical characters. These personal charisms were seen by the community as God-given gifts for the overall good of their communities.

The origins of the term however are found in the Pauline texts of the New Testament in the word *charis* (χάρις) meaning 'gift' or 'grace': different people receive particular gifts from the Spirit for the purpose of building up and renewing the Church (e.g. Romans 12:4–8 with reference to action, activity or function; 1 Corinthians 12:4–27 with reference to the diversity of acts of service for the common good; Ephesians 4:7–16 with reference to its purpose being the building up of the Body of Christ). The common understanding and meaning of the term 'charism' by the Catholic Church can be found in *Lumen Gentium* #4. Charisms are lived as socially engaged spiritualities, ways of being a disciple of Jesus in one's own time, place, and culture.

### 2.2 *Schools Founded by Religious Institutes*

Catholic schools which were founded by particular religious congregations or orders (Mercy Sisters, Good Shepherd Sisters, Loreto Sisters, De La Salle Brothers, Marist Brothers, Patrician Brothers, Jesuits, and many others) claim to be schools that are engaged in the processes of Catholic education with a particular and distinct 'flavour', approach, spirituality, a way of being present within the school community. An educational charism claims to testify to a particular and distinct way of responding to life in the spirit of Jesus, in the context of the ever-evolving mission of Jesus and the reign of God in its midst. Educational charisms are particular ways of enhancing the Catholic character of educational environments, embracing their foundational stories, interpreting and living these characteristics as integral to being the Church within the overall ministry of the universal Church.

### 2.3 *The Importance of Charismic Traditions Over the Centuries*

Founders of religious congregations and orders were people who ‘read the signs’ of their time, place and culture. They challenged their societies by re-interpreting the Gospel in a way that was relevant to a new generational context. Today we refer to such re-imaging as ‘recontextualisation’ for a new generation. Such a theological dynamic of charism reflects an understanding of scripture within the context of the ‘normativity of the future’ (Bieringer & Elsbernd 2010). It is when the essence of a particular charismic tradition resonates with the concrete, specific and real needs of a different and particular changing context within which one lives, that its evolving expression is able to embrace new horizons. These charismic traditions, however, are able to remain relevant only when they respond to the urgent needs of new contexts, rather than adhering to the ‘fixed’ traditions and ‘fixed’ ways of doing things that no longer resonate with the urgent needs of a new generation (O’Murchu 1995, 56–62).

Founders and foundresses of religious congregations and orders invited their companions with a new vision of life by recontextualising the spirit of the Gospels for their own time, place, and culture. They shared with their companions a particular way of enfleshing the vision of Jesus, “a charismic way, after the example of Jesus, of ministering in their broken and graced world with God’s own courage and depth of imagination” (Garvin 2019). After they died, their companions continued the charism by recontextualising it once again in new times. For this reason, the evolving charismic expressions over time differ from the charisms of the various founders.

### 2.4 *Moving From an Exclusive to an Inclusive Understanding of Charism*

There have been times when religious congregations saw themselves as the guardians and protectors of what they regarded as their particular charismic or spiritual tradition. Vatican II changed this focus by placing the various charismic or spiritual traditions within the wider context of the Church (‘the People of God’) as a gift for all human beings. Since that time a number of religious congregations have experienced a paradigm shift from an exclusive to an inclusive understanding of their charismic tradition. Instead of owners, they now see themselves as privileged stewards with respect to its evolving expression for each particular time, place and culture. Their focus has shifted to overseeing the rootedness of their spirituality and the corresponding theology in the evolving contexts from which each charismic tradition draws life.<sup>1</sup>

<sup>1</sup> R.J. SCHREITER, *Constructing Local Theologies*, Maryknoll Orbis Books, 1985.

### 3 Insights Into the Marist Charism of Saint Marcellin Champagnat

The Marist charism has its roots in the lived experiences of a group of young priests, one of whom was Marcellin Champagnat, living within the context of the post-French Revolution society. Their experience of Church had been that of an institution generally working against new ideas and the world, rather than working with them. The founding group had experienced this hierarchical structure from the inside and were convinced that such an approach could not meet the evolving needs of their time. The clerical culture of a heavy-handed approach, fiery sermons, imposition of 'spiritual' powers and laying guilt trips on people was perceived by them as being counterproductive. Their own experience enabled them to see that this would only further alienate people from the Church community.

These early Marists wanted the experience of Church to be more like the experience of being gathered by a 'loving mother' rather than a 'punitive father'. It was their way of 'loving the Church back to life', a reflection of how mothers create a loving, compassionate and inclusive dialogical space for their children to be at home. There was a compassionate accompaniment of people with mercy as integral to their approach to evangelisation (Snijders 1986, 58–60). It demanded a discontinuity with the practices of clericalism and invited both religious and lay people to come together to build the Marian face of the Church (Institute of the Marist Brothers 2017, 26).

A Marist charism expresses its particular spirituality in and through a pedagogy that has a focus on the following characteristics:

- A 'synodal' pedagogy of walking together. Like Mary, Marists belong to a Church of communion, relating to lay people as brothers and sisters rather than with any sense of hierarchy.
- A loving pedagogy – an educational community nurtured by love, because without love there can be no dialogue (Freire 2005, 92).
- A pedagogy of holistic formation – learning for living and for making a living, the dialogue of sharing life and faith with one another.
- A pedagogy of family spirit. "Our way of relating to the young people is by being brother or sister to them".<sup>2</sup> It concerns a particular way of thinking, feeling, and relating to people. Becoming Marist in one's outlook on life is an intuitive way of being embedded within a spirit of compassion, mercy, forgiveness and accompaniment of self and others.

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<sup>2</sup> Institute of the Marist brothers 2021, #109.

- A pedagogy of presence – a genuine and loving ‘Presence’ of brotherhood/sisterhood, actively seeking opportunities to be with the people, spending time with them, and influencing them in and through ‘presence’.
- A pedagogy of simplicity – being people of integrity in our relationships, truthful, open-hearted, transparent with an absence of duplicity. A down-to-earth way of connecting with people: ‘what you see is what you get’.
- A pedagogy of the love of work – the work of making Jesus known and loved in and through one’s faithful engagement with life.
- A pedagogy of a practical and innovative spirit – an openness to new paradigms for making Jesus known and loved.
- A pedagogy of effective and responsible solidarity with the poor – a particular focus on “caring for the well-being of children, youngsters, vulnerable families, and poor and neglected people”.<sup>3</sup>

The ‘glue’ that holds the Marist charism together is: quality of presence. Evangelisation happens in and through the quality of presence, the quality of paying attention to the needs and concerns of the other, for the sake of the other. It is a presence of the heart, a presence to the present moment of another, for the other.

## 4 Empirical Operationalisation of ‘Charism’

### 4.1 *How to Measure Something as ‘Intangible’ as a Charism?*

Previous research<sup>4</sup> indicated that the specifics of charismatic traditions rest in the relationship and the particular fusion of the characteristic features that are identified as common to those charisms. Michael Green has indicated that “it is in the mix rather than in the identification of each common characteristic that a particular charismatic spirituality finds its place” (Green, 2000). Therefore, the empirical operationalisation of the new instrument is attuned to a specific ‘mix’ of those various elements that together constitute a charism.

### 4.2 *A Multi-dimensional Model*

The Charism Scale is based on a five-dimensional typology, designed so that the core of the instrument (dimensions 2–5) refers to four different key

<sup>3</sup> Institute of the Marist Brothers 2017, #33.

<sup>4</sup> PEMBLE, P., *Measuring Charism. An Empirical Study Assessing the Characteristics of Marist Charism in Australian Marist Schools* (2012); and BOUWENS, J. & SLECHTEN, B., *De Charisma Schaal. Ontwikkeling van een Onderzoeksinstrument* (2014).

characteristics that are constitutive of all charisms: theological, relational, pedagogical and institutional. These can be applied to any charismatic tradition. Next, they are related to the degree to which a specific charismatic tradition is known and appropriated by the people in the school (dimension 1) – in this case: Marist. In other words, the scale's construction is based on four different interacting dimensions constitutive of educational charism (dimensions 2–5), related to a point-in-time assessment of the degree of knowledge and appropriation of a specific charismatic tradition perceived to be taking place (dimension 1).

#### 4.2.1 The 'Charism Dimension'. Knowledge and Appropriation of the History and Charismatic Tradition

To what extent are the people in a Marist school aware of the Marist story and their school's charism, and – more than that – do they actually live the essence of that story in their own time, place and culture? Appropriation of the Marist charism becomes a reality when a particular group of people express their Catholicity with a flavour inspired by the example of Mary and Champagnat for the purpose of “making Jesus known and loved”.

#### 4.2.2 The 'Theological Dimension'. Recontextualising Faith and Life vs Fitting Life Into the Tradition

All religious schools are faced with the inherent tension of living one's faith within the changing circumstances of life and culture, and what is sometimes seen as having to conform one's manner of living to a 'fixed' faith tradition. The Marist charism, for instance, finds its origin in engaging with the inherent tension of the Catholic tradition by moving towards new expressions of that tradition in the particular context of the aftermath of the French Revolution. They responded to the paradigm shifts of the Enlightenment with new expressions of “making Jesus known and loved”, new ways of working the tradition rather than seeing oneself as simply having to fit into the tradition. Catholic schools today are faced with a similar challenge: how to recontextualise their tradition in the rapidly changing context of the twenty first Century?

#### 4.2.3 The 'Relational Dimension'. Trust in Encounter and Dialogue vs Cautiousness in Encounter and Dialogue

All of life is a face-to-face encounter within a context of the inherent tension between trust and cautiousness. This dimension assesses whether a perception indicates 'trust' or 'cautiousness' in relationship with 'otherness'. It is not an either/or scenario but rather a combination of certain levels of trust and cautiousness that becomes alive within a spirit of inclusivity.

#### 4.2.4 The 'Pedagogical Dimension'. A Cognitive vs a Personal Approach to Teaching and Learning

All schools are engaged in both cognitive and personal elements of teaching and learning. This dimension assesses whether the stress is on 'cognitive' or 'personal', whether a school's vision for education is content-centred or person-centred. It assesses the balance between assimilating content and developing critical thinking skills, between conformity to a particular 'fixed' expression and the exploration of a diversity of possible expressions, between religious instruction and religious education. In other words, this dimension focuses on the level of integration of one's intellect, heart and gut regarding teaching and learning at school.

#### 4.2.5 The 'Institutional Dimension'. Institutional Structure and Leadership vs Family Spirit

All schools have both institutional and charismatic elements within their organisational and leadership structures. This dimension assesses whether the stress is on 'institutional spirit' or 'family spirit'. Education in the Champagnat tradition, for instance, is a synodal model of walking together in the Marist mission. Whilst the institution will remain, any feudal, impersonal, authoritarian expressions are to give way to new expressions that emphasise the importance of 'personal presence' as integral to "making Jesus known and loved", and new expressions with a focus on the quality of interpersonal 'presence'.

### 4.3 *Method and Process of Developing a Valid and Reliable Scale*

We established the five dimensions that constitute the typology based on an extensive, systematic, and carefully controlled process. The process began with a hypothetical model that was gradually adapted and refined in dialogue with the empirical data. At each stage, the construction of the typology, and the acceptance, rejection or rephrasing of the survey items that assess its dimensions, were directly linked to the feedback of empirical data.

The initial survey consisted of ten hypothetical dimensions in the search for empirical validation and it was trialled in three secondary Marist schools in Australia in 2017 and involved a sample of 555 respondents. Data analysis led to the recognition of seven possible dimensions with four having considerable overlap. The second trial, consisting of seven dimensions, the rewriting of survey items within the four overlapping dimensions and some further exploratory items, was conducted in Ireland in 2019 and involved 441 respondents in three Marist schools. Data analysis led to the recognition of five dimensions with considerable overlap in three of them. The third trial, consisting of five dimensions, the rewriting of some items and some further exploratory items,



was conducted in Australia in 2019 and involved 1384 respondents in three Marist schools.

The fourth and final trial, involving the same five dimensions, and the rewriting of some items, was conducted in Australia in 2020–2021 and involved 939 respondents in five secondary Marist schools in the (arch)dioceses of Wollongong, Melbourne and Wilcannia-Forbes. Part of the sample were 143 students in years 7–8 (average age = 13y), 92 students in years 9–10 (age = 15.1y), and 578 students in years 11–12 (age = 16.7y). 71% of the students were male; 29% female. 68% of the students were baptised Catholics; 32% were not. Where the adults are concerned, 7 school leaders (age = 42.9y) and 100 staff members (age = 52y) took part in the trial. Finally, we also included the responses of 19 parents (age = 46.2y). 48% of the adults were male; 52% female. 74% of the adults were baptised Catholics; 26% were not. Careful analysis of the data led to a five-dimensional typology with six items in each of the dimensions.

4.4 Instrument Design

4.4.1 Two Kinds of Nine-point Likert Scales

Regarding the theological, relational, pedagogical and institutional aspects of educational charism, dimensions 2–5 are presented as tensions between two opposite though legitimate extremes, that always appear combined in a ratio that varies from school to school, and from charism to charism. The survey instrument has been designed to measure the degree of a respondent’s engagement with these opposite positions. It uses a 9-point Likert scaling method (Rensis Likert, 1932) that allows a respondent to accurately indicate which ‘mix’ of the two extremes resonates with his/her personal experience or point of view (Figure 1).

In my Marist school, teachers direct students in their learning.	Indicate which of these alternatives comes closest to the current practice in your Marist school. <div><input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></div> <div><input type="checkbox"/> Neither of these alternatives</div>	In my Marist school teachers accompany and guide students in their learning.
In an ideal Marist school, teachers would direct students in their learning.	Indicate which of these alternatives comes closest to an ideal Marist school. <div><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/></div> <div><input type="checkbox"/> Neither of these alternatives</div>	In an ideal Marist school, teachers would accompany and guide students in their learning.

FIGURE 1 Sample questionnaire item, dimensions 2–5

My Marist school invites everyone to give a Marist flavour to living the spirit of the Gospel.	To what extent do you agree with this statement? 1 = "I totally disagree". 9 = "I totally agree".								
	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7	<input type="radio"/> 8	<input type="radio"/> 9

My ideal school would invite everyone to give a Marist flavour to living the spirit of the Gospel.	To what extent do you agree with this statement? 1 = "I totally disagree". 9 = "I totally agree".								
	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7	<input checked="" type="radio"/> 8	<input type="radio"/> 9

FIGURE 2 Sample questionnaire item, dimension 1

Regarding dimension 1, the instrument uses a different 9-point Likert scale which indicates (dis)agreement with statements that express maximum levels of knowledge and appropriation of the history and tradition of the respective charism – in this case: Marist (Figure 2).

4.4.2 Two Measurement Levels Compared to an ‘Expert Calibration’

4.4.2.1 *The Factual Level*

The instrument has a dual focus. On the one hand, it ascertains what the respondents consider the ‘current practice’ of their school to be like. The survey assesses how people experience each of the five dimensions in daily school life, in relation to each other.

4.4.2.2 *The Normative Level*

On the other hand, the instrument determines what the respondents would like to happen in their ideal school community. In other words, the survey assesses the ‘ideal’ relationships between the five interlinking dimensions in the eyes of the people involved.

4.4.3 The ‘Expert Calibration’

Before the instrument is administered to a school, an ‘expert group’ needs to determine the ‘perfect’ response to each statement from the ideal-typical perspective of the specific charismatic tradition under investigation. The task of the experts is to determine what a ‘true and pure’ expression of a specific charism would be like in ideal circumstances, with regard to each of the five dimensions. The ‘expert’ calibration is then compared to both the factual and normative responses of the people in a school. This provides the school leadership with empirical data to assist them in identifying areas for further growth in the appropriation of their spiritual tradition.

Next to the trial data from Marist schools, we collected the input of a Marist ‘expert group’ that determined the ‘ideal’ Marist charism, which a particular

Marist school community is invited to work towards, within their own particular place, time and culture. The 'expert group' was consulted in 2021 and consisted of 12 prominent members of *Marist Schools Australia* (MSA) and other Marist experts from Ireland, Scotland, Italy and Australia who have / have had significant responsibilities in Marist schools in various countries.

#### 4.5 *Analysis of the Fourth Trial (2020–2021)*

In the fourth and final trial, the respondents were asked to visit the ECSI Website [www.ecsi.site/au](http://www.ecsi.site/au) to answer 46 questions on the factual and the normative level (92 responses in total), followed by four evaluation questions. Regarding the difficulty level, the instrument received a score of 4.8 out of 10, which means that the survey was neither easy nor too difficult. On average, the respondents agreed that they could understand the questions by giving a score of 5.0 on a 7-point agreement scale. An average score of 3.8 out of 7 indicated that people did not dislike completing the survey (although it was not a very enjoyable experience either). Finally, they were asked to provide a written reply to the question whether the survey captured all relevant features of Marist charism.

In the five participating Marist schools in the Australian states of New South Wales and Victoria, 813 students in secondary education (aged 12–18 years), 107 staff members, and 19 parents filled in the trial version of the Charism Scale, resulting in a total of 939 respondents. This dataset was subjected to a thorough statistical analysis.

##### 4.5.1 Clean Factor Patterns on the Factual and Normative Measurement Levels

*Exploratory factor analysis*<sup>5</sup> reveals the existence of five latent variables that correspond to the five dimensions we were hoping to discover, on both measurement levels. Deliberately testing a large number of statements – more than ultimately needed – made it possible to remove 16 less functioning items, after which 30 items remained: six items for each of the five dimensions. The underlying factor patterns (Figures 3 and 4) show a convincing clustering of the remaining items that correspond to the five dimensions. Although weaker correlations appear between some items belonging to two sets of dimensions, this overlap remains statistically insignificant. We can conclude that the

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5 EFA performed by IBM SPSS Statistics, version 28.0.0.0. Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalisation.

Variables F	1	2	3	4	5	Mean	Type
CH2F	0.87	-0.15	0.00	0.07	-0.05	7.24	Charismic tradition
CH3F	0.86	-0.15	-0.05	0.06	-0.04	7.05	Charismic tradition
CH5F	0.86	-0.18	-0.03	0.09	-0.02	7.30	Charismic tradition
CH6F	0.85	-0.17	0.03	0.06	-0.07	7.02	Charismic tradition
CH1F	0.79	-0.07	-0.01	0.00	-0.02	6.93	Charismic tradition
CH4F	0.75	-0.16	0.11	-0.03	-0.21	6.40	Charismic tradition
CH14F	-0.10	0.79	-0.04	0.03	0.05	3.40	Trust-cautiousness
CH17F	-0.08	0.76	-0.04	0.00	0.07	3.32	Trust-cautiousness
CH18F	-0.15	0.62	0.05	-0.02	0.08	3.47	Trust-cautiousness
CH15F	-0.12	0.61	-0.02	-0.10	0.33	3.56	Trust-cautiousness
CH16F	-0.21	0.59	-0.03	0.01	0.09	3.16	Trust-cautiousness
CH19F	-0.14	0.56	-0.16	0.01	0.25	4.03	Trust-cautiousness
CH38F	-0.14	0.08	0.79	0.06	0.05	3.78	Institutional-Family spirit
CH35F	-0.01	0.06	0.74	0.18	-0.10	4.00	Institutional-Family spirit
CH39F	0.02	-0.13	0.69	0.28	0.02	4.63	Institutional-Family spirit
CH41F	0.05	-0.15	0.64	0.28	0.05	4.74	Institutional-Family spirit
CH42F	0.11	0.01	0.64	0.22	-0.01	4.52	Institutional-Family spirit
CH40F	0.00	-0.19	0.60	0.29	0.17	4.79	Institutional-Family spirit
CH20F	0.07	0.02	0.18	0.76	0.00	5.04	Cognitive-personal
CH32F	0.08	-0.09	0.08	0.74	0.06	5.41	Cognitive-personal
CH24F	0.03	0.01	0.28	0.68	0.00	4.73	Cognitive-personal
CH21F	0.05	0.13	0.26	0.61	0.01	4.75	Cognitive-personal
CH23F	-0.03	-0.02	0.18	0.58	-0.05	4.58	Cognitive-personal
CH30F	0.03	0.06	0.25	0.44	0.24	4.55	Cognitive-personal
CH10F	-0.10	0.14	-0.04	0.02	0.73	4.49	Recontextualised faith
CH7F	-0.04	0.18	0.14	0.10	0.60	4.54	Recontextualised faith
CH11F	-0.10	0.26	0.07	-0.13	0.55	4.05	Recontextualised faith
CH9F	-0.03	0.32	0.00	0.11	0.48	3.98	Recontextualised faith
CH12F	-0.06	0.30	-0.02	0.01	0.41	4.01	Recontextualised faith
CH8F	-0.12	0.26	-0.06	0.16	0.38	3.87	Recontextualised faith
	4.3	3.7	3.2	2.9	2.1		

FIGURE 3 Factual factor patterns

existence of five distinct dimensions, hypothesised by the typological model, is confirmed by the empirical evidence. The data below is based on the entire sample of 939 respondents; nevertheless, the test was successfully repeated for students and adults separately as well.

4.5.2 Cronbach's Alpha: Internal Consistency

Cronbach's Alpha provides a measure of 'internal consistency' or how closely a set of survey items as a group are related. As such, it is a measure of scale reliability. The Cronbach's Alpha statistics confirm the internal consistency of the latent variables of the Charism Scale on the factual and normative measurement levels, for each of the five dimensions (Table 1). This corroborates the conclusion of the factor analysis.

Variables N	1	2	3	4	5	Mean	Type
CH2N	0.89	-0.14	0.01	0.06	-0.02	6.78	Charismic tradition
CH3N	0.88	-0.16	0.01	0.06	-0.04	6.70	Charismic tradition
CH5N	0.88	-0.20	0.00	0.05	-0.06	7.03	Charismic tradition
CH4N	0.87	-0.09	-0.02	0.02	-0.11	6.37	Charismic tradition
CH6N	0.87	-0.19	0.05	0.02	-0.07	6.90	Charismic tradition
CH1N	0.84	-0.06	-0.01	-0.02	0.02	6.35	Charismic tradition
CH17N	-0.09	0.80	-0.09	-0.04	0.11	2.53	Trust-cautiousness
CH15N	-0.09	0.75	0.00	-0.11	0.17	2.84	Trust-cautiousness
CH14N	-0.14	0.75	-0.07	0.05	0.18	2.60	Trust-cautiousness
CH19N	-0.13	0.70	0.03	-0.18	0.18	3.14	Trust-cautiousness
CH18N	-0.11	0.67	-0.02	0.04	0.15	3.18	Trust-cautiousness
CH16N	-0.22	0.65	0.02	0.01	0.09	2.59	Trust-cautiousness
CH38N	-0.11	0.05	0.77	0.03	-0.05	5.08	Institutional-Family spirit
CH35N	-0.06	-0.02	0.75	0.14	-0.10	5.58	Institutional-Family spirit
CH42N	0.04	-0.04	0.74	0.14	0.02	5.55	Institutional-Family spirit
CH41N	0.01	-0.18	0.72	0.25	0.05	5.90	Institutional-Family spirit
CH39N	0.04	-0.16	0.68	0.24	0.16	5.77	Institutional-Family spirit
CH40N	0.07	-0.09	0.64	0.28	0.10	5.57	Institutional-Family spirit
CH20N	0.10	0.02	0.23	0.74	0.06	5.29	Cognitive-personal
CH24N	0.06	-0.06	0.26	0.65	0.03	5.38	Cognitive-personal
CH32N	-0.02	-0.16	0.25	0.64	-0.03	5.71	Cognitive-personal
CH23N	0.00	0.01	0.25	0.63	-0.11	5.32	Cognitive-personal
CH21N	0.10	0.09	0.29	0.50	0.04	5.06	Cognitive-personal
CH30N	0.06	0.21	0.28	0.36	-0.05	4.97	Cognitive-personal
CH10N	-0.04	0.29	-0.03	-0.01	0.71	3.81	Recontextualised faith
CH7N	-0.07	0.24	0.26	-0.11	0.64	4.25	Recontextualised faith
CH11N	-0.06	0.24	-0.02	-0.14	0.56	3.53	Recontextualised faith
CH9N	-0.06	0.26	-0.05	0.19	0.53	3.51	Recontextualised faith
CH12N	-0.07	0.29	-0.07	0.01	0.52	3.41	Recontextualised faith
CH8N	-0.10	0.29	-0.06	0.15	0.41	3.32	Recontextualised faith
	4.7	4.5	4.3	2.5	2.2		

FIGURE 4 Normative factor patterns

TABLE 1 Cronbach's Alpha scores

Five dimensions	Alpha_Factual	Alpha_Normative
Dim1 'Charismic Tradition'	0.92	0.94
Dim2 'Recontextualised Faith'	0.74	0.82
Dim3 'Trust-Cautiousness'	0.80	0.86
Dim4 'Cognitive-Personal'	0.78	0.83
Dim5 'Institutional-Family Spirit'	0.83	0.86

#### 4.5.3 Pearson Correlation Matrix: Linear Associations Between Sets of Survey Items

On both measurement levels, the Pearson correlation matrices show significant linear associations between items that correspond to the same dimension, while their correlation is much weaker with items that assess the other dimensions. This suggests that the dimensions are independent and fluctuate without influencing each other. Once again, this indicates that those statements remind respondents of the same latent constructs that function in their perception of reality. This allows us to estimate the average presence (factual) and average desirability (normative) of those constructs – identified by our model as five dimensions of educational charism – based on the item statistics.

As suggested by the Factor Analysis, we nonetheless detect some correlation between two sets of dimensions. In particular, there is a certain connection between ‘Existential Faith’ (Dim2) and ‘Trust vs Cautiousness’ (Dim3): factual  $r = 0.38$ ; normative  $r = 0.42$ . This is indicative of a positive relationship between these dimensions: a robust degree of trust facilitates a movement towards recontextualisation, while a mentality of cautiousness makes people repeat safe, traditional theological patterns. Likewise, we detect a certain interaction between ‘Cognitive vs Personal Pedagogy’ (Dim4) and ‘Institutional vs Family Spirit’ (Dim5): factual  $r = 0.39$ ; normative  $r = 0.42$ . This too is understandable: a personal pedagogical approach creates a family spirit at school, while a more cognitive approach to teaching and learning is constitutive of a more institutional environment. Nevertheless, the observed overlap is much weaker than the correlations between the groups of items that belong to the same dimension. There is a certain level of interaction, which is neither unexpected nor problematic.

#### 4.5.4 Conclusion: Validation of the Charism Scale

Over the course of four trial runs, the five-dimensional typology was gradually developed and empirically verified, whereby the validity of the instrument improved step by step. The statistical analysis of the final trial confirms that we have reached the goal of creating a stable multivariate scale. We discovered that in educational charism there are five distinct dimensions at work, which the new Charism Scale can empirically assess on the factual and the normative level, in a valid, reliable and effective way.

### 4.6 *Bringing Together the Elements of the Charism Scale Diagrammatically*

#### 4.6.1 Accumulative Student and Adult Responses

Let us read and interpret the results of the trial. The diagrams above (Figures 5–8) indicate the combined results of students and adults in five

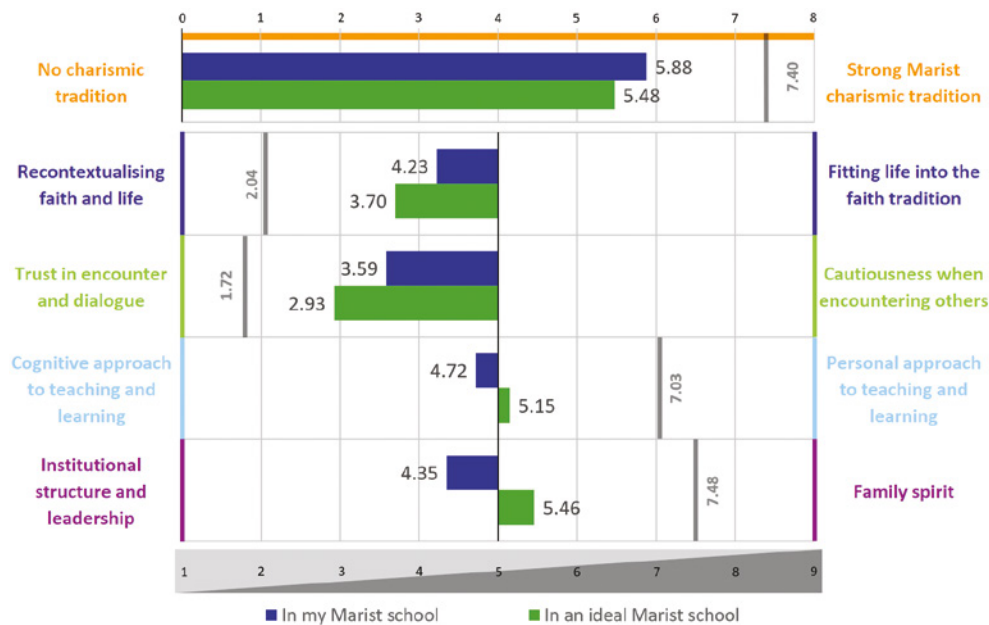


FIGURE 5 Mean scale scores of the students

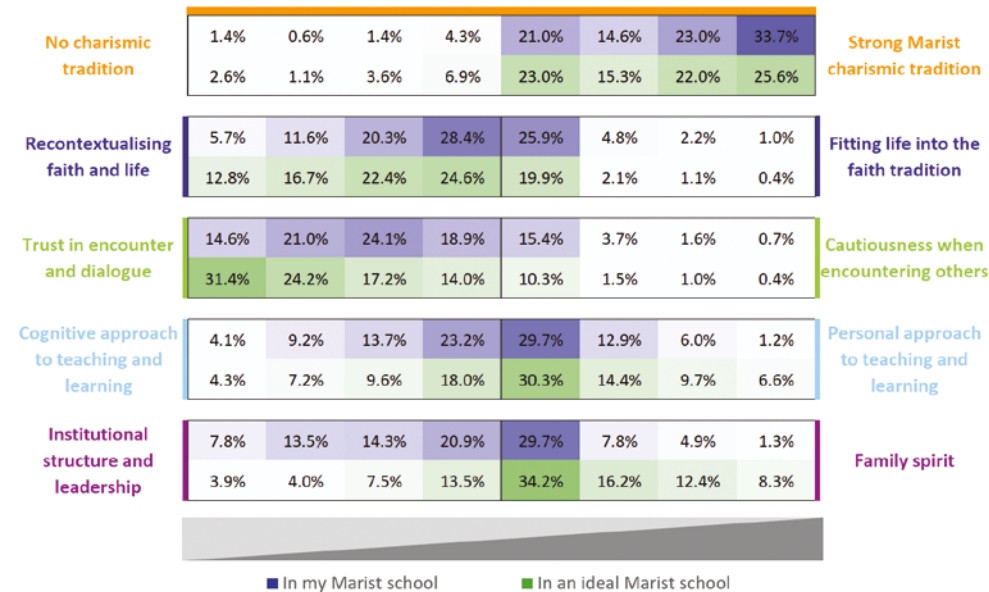


FIGURE 6 Distribution of student responses



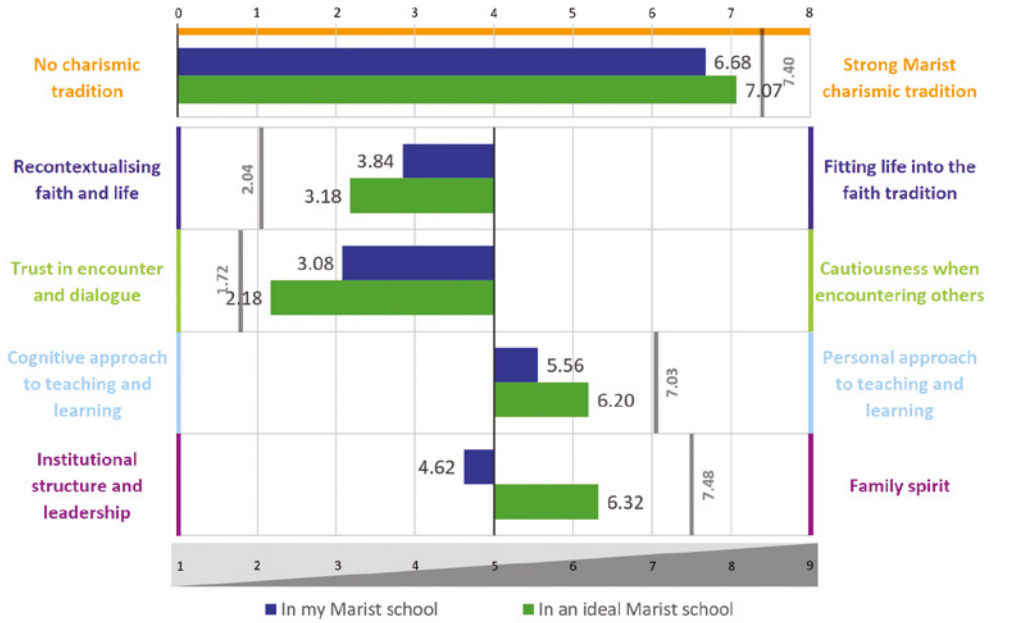


FIGURE 7 Mean scale scores of the adults

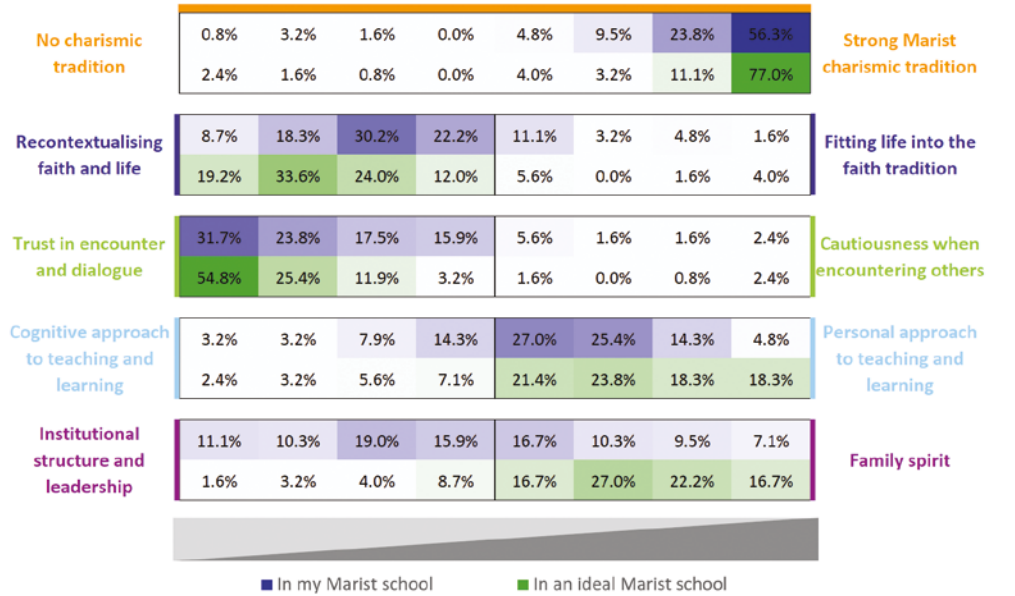


FIGURE 8 Distribution of adult responses



schools with respect to the factual (blue) and normative (green) level of each dimension.<sup>6</sup> The grey vertical lines (in Figures 5 and 7) indicate the 'expert calibration', the score the 'expert group' would expect to see in an 'ideal' Marist school.

Students clearly recognise the presence of the Marist charismatic tradition in their schools on the factual level (5.88/8). According to staff and parents, however, the Marist approach is simply overwhelming (6.68/8). This raises the question whether adults somehow overestimate its impact on students? Students, whilst valuing such tradition, would prefer there to be a little less emphasis on the normative level (5.48/8), well below what the 'expert group' considers ideal (7.40/8). Staff and parents, however, are extremely eager to create an even stronger Marist environment (7.07/8; 95.3% agreement), far beyond the students' expectations.

The other four dimensions qualify the ways in which students and adults want to give shape to their school's Marist character. From a theological point of view, adults recognise some levels of recontextualisation on the factual level (3.84/8), more than the students do (4.23/8). In fact, 33.9% of the students feel the expectation that they should fit their lives into the faith tradition. It is interesting that both generations clearly wish to move towards more recontextualisation of faith and life (3.18/8; 3.70/8). The 'expert group' gives their permission and encourages them to do so (2.04/8). What is preventing the schools from fully engaging in it?

When asked to consider the Marist character of their schools, trust in encounter and dialogue is an important value for students (2.93/8), even more for adults (2.18/8), and it is especially crucial according to the Marist 'expert group' (1.72/8). Everybody supports the movement towards a more trusting environment. Yet, in daily school life people do not perceive this quality as strongly as they would like (students: 3.59/8; adults: 3.08/8). In the present context, the need for some cautiousness when encountering others appears to slow down the realisation of the ideal.

Regarding the schools' approach to teaching and learning, students see a fifty-fifty balance between a cognitive and a personal approach (4.72/8), whereas the adults believe that the balance is actually tipping towards a more person-centred pedagogy (5.56/8). The 'expert group' insists that Marist

6 The t-test for independent samples confirms that the means of students and adults differ significantly ( $p \leq 0.01$ ) for the five dimensions on factual and normative levels. The only exception, however, is the 'Institutional Dimension' on the factual level: in this particular sample, the mean scores are so close that it cannot be confirmed which group scores 'higher' or 'lower'.

charism requires a strong personal presence (7.03/8). On the normative level, adults tend to hold the same view (6.20/8). Students, however, reluctantly resist an all too personal approach and actually prefer some cognition-oriented teaching and learning in the 'mix' as well (5.15/8).

Finally, the 'expert group' underscores the importance of 'family spirit' for a true Marist school (7.48/8). In contrast, the students perceive the structure and leadership of their schools tilting towards being 'institutional' (4.35/8). The staff and parents do not deny this (4.62/8), but admit that more effort is needed to create a 'family spirit' in line with the Marist ideal (6.32/8).

#### 4.6.2 Bringing Together the Five Dimensions

After having examined the scores on the five dimensions separately, it is important to bring them together and to determine how the educational charism of Marist schools emerges from the 'mix' of these components. Their relationship is visually represented as semi-transparent geometrical shapes, scalene quadrilaterals (Figures 9–10) and triangles (Figures 11–16), overlapping with one another to different degrees, visually indicating congruences and differences. The five dimensions on the factual (blue) and normative (green) levels are being compared with one another and with the 'expert group' calibration (black). This provides a model of how the dimensions combine and result in an overall picture at a particular time, place and school culture.

In the square-shaped diagrams (Figures 9–10), the theological, relational, pedagogical and institutional dimensions come together. The tilting of the quadrilaterals suggests an overlap but also tension between what is perceived and what is desired, by the respondents and the 'expert group'. The Charism Dimension stands separate on the left-hand side.

In the three triangle-shaped diagrams, the two 'religious dimensions' are brought together. The Charism Dimension always forms the base and the Theological Dimension the left upright leg of the triangle. These are combined with the relational (Figures 11–12), pedagogical (Figures 13–14), and institutional dimensions (Figures 15–16) respectively in the right upright leg of the triangle. For the purpose of enhancing the degree of knowledge and appropriation of the charismatic tradition (Dim1), expressed in a certain tension between recontextualisation and reconfectionalisation (Dim2), it is being linked to the way people relate to each other (Dim3), to the approach to teaching and learning (Dim4), and to the structural and leadership characteristics of the organisation (Dim5), respectively.

Let us try to read and interpret the information in Figures 9–16. The square-shaped diagrams (Figures 9–10) show the mutual relatedness of the theological,

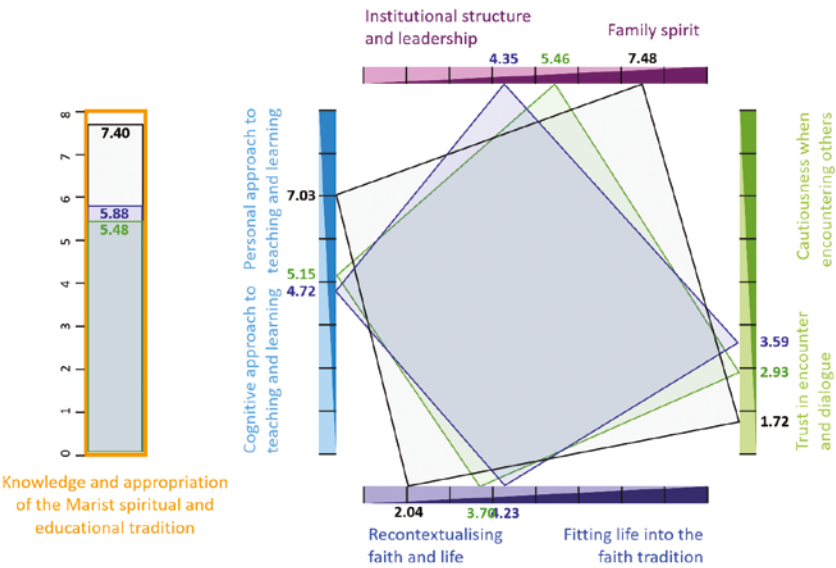


FIGURE 9 Student responses, factual and normative, compared to the ‘expert calibration’

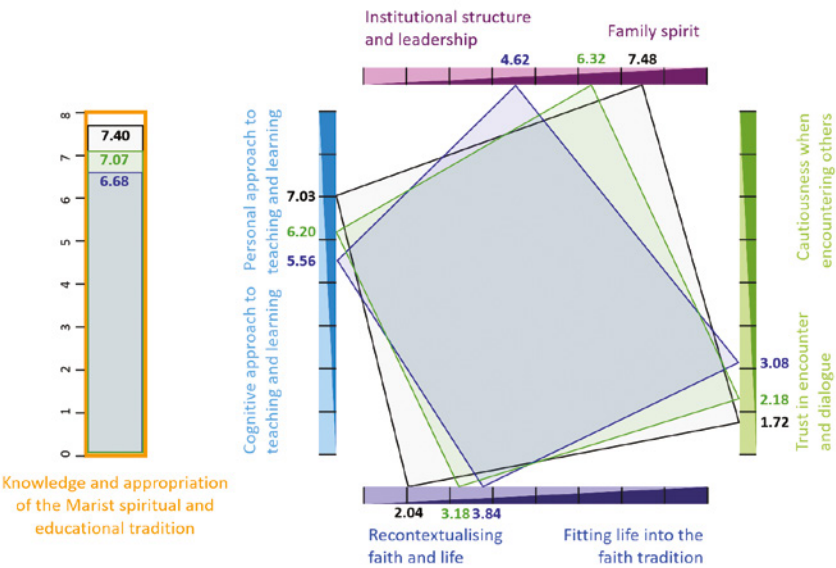


FIGURE 10 Adult responses, factual and normative, compared to the ‘expert calibration’

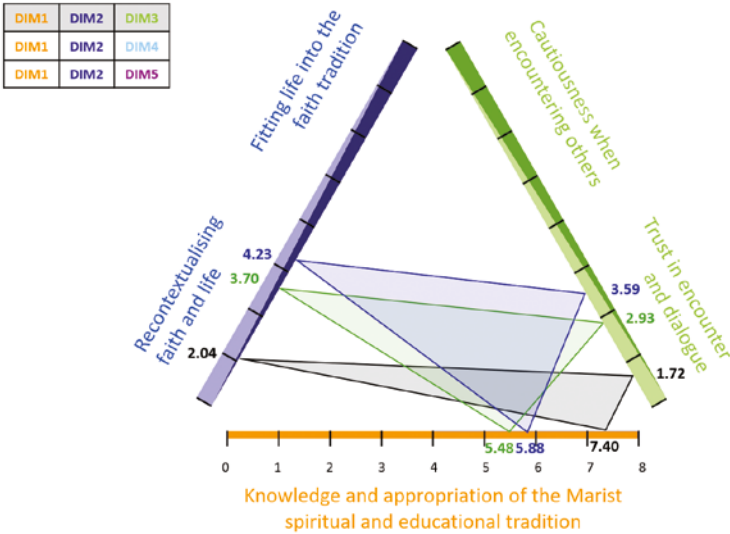


FIGURE 11 Students: relationship between the religious dimensions, and the relational dimension

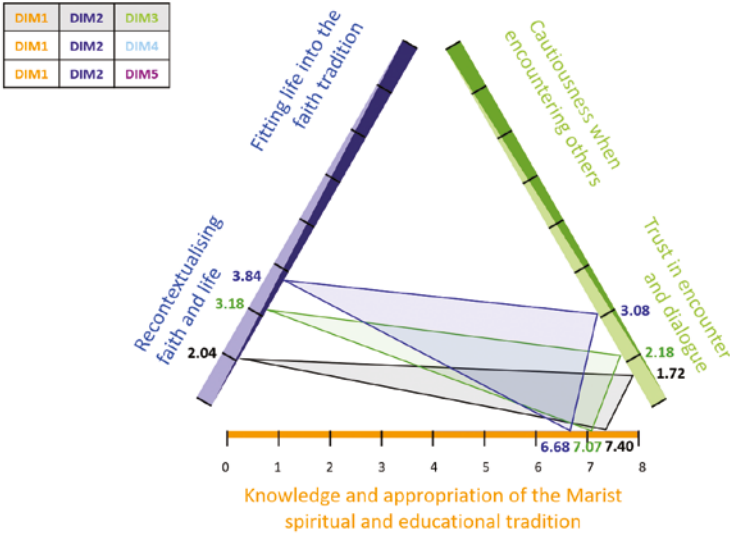


FIGURE 12 Adults: relationship between the religious dimensions, and the relational dimension

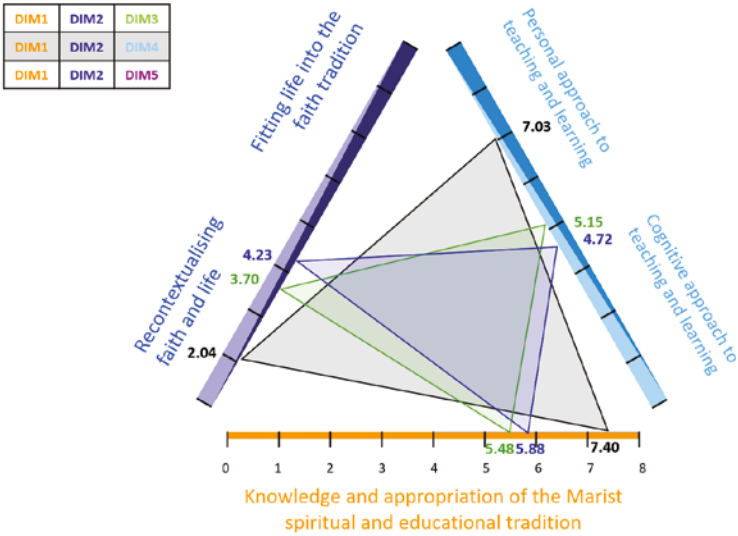


FIGURE 13 Students: relationship between the religious dimensions, and the pedagogical dimension

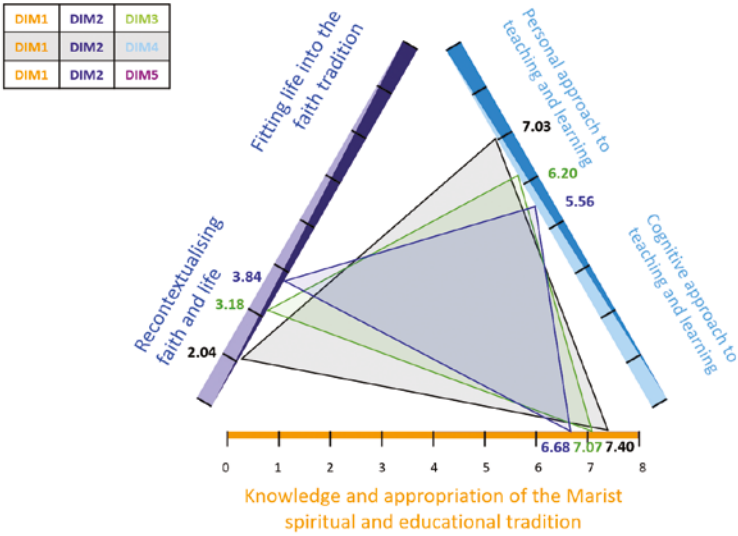


FIGURE 14 Adults: relationship between the religious dimensions, and the pedagogical dimension

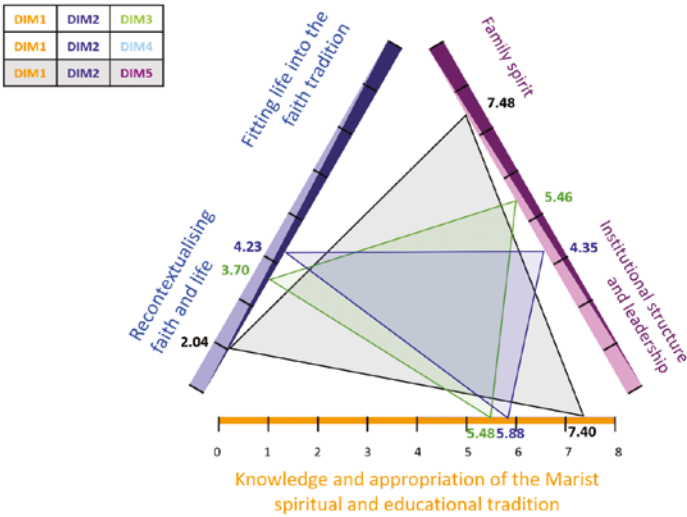


FIGURE 15 Students: relationship between the religious dimensions, and the institutional dimension

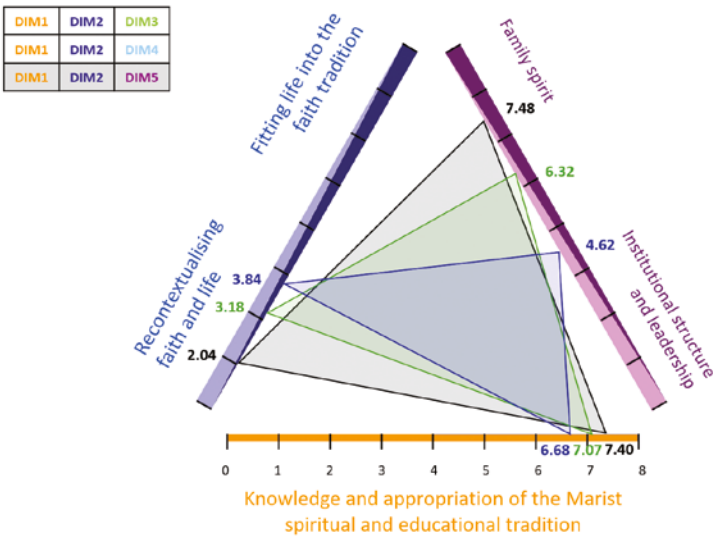


FIGURE 16 Adults: relationship between the religious dimensions, and the institutional dimension

relational, pedagogical and institutional dimensions, and the impact they exert on each other. The 'expert group' claims that a true Marist charism is pre-eminently characterized by unconditional mutual trust in a very homely atmosphere, giving rise to a person-oriented pedagogical approach, however without losing sight of the cognitive aspects of teaching and learning. It is all 'in the mix', and according to Marists, this particular combination turns out to be very important, and a precondition for realising an authentic recontextualisation of the Catholic faith tradition among young generations today.

The results show that there is significant readiness among the adult group to enhance these typically Marist characteristics which are already present within their school communities (Figure 10). The blue and green quadrilaterals that show the adults' position are clearly tilted towards the black quadrilateral of the 'expert group'. Staff and parents are 'pushing' the schools towards the ideal, yet they are not nearly as convinced, fervent and 'radical' as the 'expert group' would prefer.

The students, whilst also indicating an appreciation and appropriation of the charismatic tradition, feel less strongly about it (Figure 9). While the levels of mutual trust are pretty high, there is also some apprehension 'in the mix'. This seems connected to the clear difficulty with respect to the creation of a family spirit within the necessary institutional structure of a school, with students perceiving their schools to be more institutional than the adults. It is within this context that the students prefer a combination of both a personal and a cognitive approach to teaching and learning. It is no surprise that the adventure of recontextualisation seems a bit too ambitious and risky to them, with some confessional and reconfessionalising components operating in the background.

The triangle-shaped diagrams (Figures 11–16) show that the relational, pedagogical and institutional aspects have a mutual impact not only on the degree of recontextualisation of the faith tradition, but also on the degree of appropriation of the Marist charism. The 'expert group' claims that a true Marist charism requires a very high degree of recontextualisation. The more recontextualisation occurs and is pursued, the more the charism is strengthened.

This movement is supported by personal relationships characterised by complete openness, trust and surrender (Figures 11–12). It is also supported by a pedagogy that greatly values a personal affinity between teachers and students, without neglecting the cognitive aspects of learning (Figures 13–14). It is equally supported by a school environment that feels like a 'home' where people feel safe, protected and supported, while institutional structures are reduced to the necessary minimum (Figures 15–16).

According to the graphs, the more the schools strive for these specific balances, the more they approach the Marist ideal. But whereas everybody is prepared to support the ideal, the students prefer to maintain an increased degree of distance, compared to the adults. Moreover, despite the shared ideal, it is striking that the reality of daily school life somewhat lags behind, which is confirmed by the students and to a lesser degree also by the adults. Although the schools are moving in the right direction, there is still work to be done.

## 5 Putting the 'Marist Charism Scale' to Use

The new Charism Scale has been constructed and tested within the context of the Marist charismatic tradition in Australia. We therefore name the first version of the instrument: 'Marist Charism Scale'. The newly created scale provides Marist schools across the world with the opportunity to empirically assess the appropriation of their charism. An analysis of the data allows the school leadership to discover to what degree their school lives up to the ideal of its charismatic tradition, identify those areas that may provide a movement closer to ideal, and incorporate this into future planning and growth.

The development of the Charism Scale is an exciting new development within the *Enhancing Catholic School Identity* (ECSI) research and adds another layer to it. The results of the new instrument can easily be complemented by the results of the existing ECSI tools.<sup>7</sup> One could describe how the charism data relates to other characteristics of Catholic school identity, and develop a deeper understanding of a school's unfolding Catholicity within the context of its charismatic tradition.

It is important to note that the resulting data is confidential to a school community. Schools are at different stages of appropriation, and this is to be respected. It is the individual school that decides how to respond to the empirical findings. The Charism Scale is neither about competition between school communities, nor about being evaluated by an 'expert group'. Rather, it is about acquiring a useful conceptual framework and the associated vocabulary, gaining deeper insight by means of bottom-up empirical data, making evidence-based decisions, and enhancing the collaboration between the members of the school community.

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<sup>7</sup> Discover the other ECSI instruments on: <https://www.ecsi.site/au/foundations/>.



## 6 Recommendations for Further Research

1. The statistical analysis of the fourth trial shows that the five dimensions are independent and distinctive in themselves – and that the items within each of the dimensions clearly belong to that dimension. There is nonetheless some relationship between ‘Trust vs Cautiousness’ (Dim2) and ‘Existential Faith’ (Dim5), and between ‘Institutional vs Family Spirit’ (Dim3) and ‘Cognitive vs Personal Pedagogy’ (Dim4). Whilst statistically not significant, further research may be able to measure with more precision the specificity of each dimension and thus minimise the overlap even more.

2. Next to a *Marist* Charism Scale, also other versions of the instrument can be created to assess different educational charisms. Although the instrument was designed to work in any educational charismatic tradition, statistically verifying this will entail further engagement with those Charisms. To use the scale in other-than-Marist schools, some modifications are needed with respect to the first dimension while the other items should remain the same.

Only when follow-up research reveals that different charismatic traditions exhibit distinct patterns in terms of the five dimensions, will it be scientifically proven that those educational charisms are in fact distinct realities, whose specific characteristics go beyond mere intuition and subjective testimony, beyond a gut-felt ‘way of being’ and doing things in a particular way. That will be the next chapter of this story.

3. How about using the Charism Scale to empirically assess the nature of ‘dual charism schools’ that were created by the amalgamation of two (or more) schools originally founded by religious institutes with different charismatic traditions? For this purpose, two (or more) ‘expert group’ calibrations would need to be compared with the results on the factual and the normative level. Is would be possible to investigate to what extent the two original charisms continue to coexist, or whether one takes over while the other dissipates, or whether they merge into a single new approach that is a kind of fusion?

Appendix. ‘Marist Charism Scale’ Survey Items

Type	Item	
Charismatic tradition	My Marist school is inspired by the Christian example of Saint Marcellin Champagnat.	
	In my Marist school we talk about doing things in a Marist way.	
	My Marist school is proud of its historical links to Saint Marcellin Champagnat.	
	My Marist school, like Saint Marcellin Champagnat, is influenced by the example of Mary.	
	In my Marist school there are many visual indications of its Marist tradition – making Jesus known and loved: symbols, logos, posters, statues, art, etc.	
Charismatic tradition	My Marist school invites everyone to give a Marist flavour to living the spirit of the Gospel.	
Item on one side of the continuum		Item on the other side of the continuum
Trust-cautiousness	My Marist school is trusting of people's differences.	My Marist school is cautious about people's differences.
Trust-cautiousness	In my Marist school we are open to people who are different.	In my Marist school we are cautious about people who are different.
Trust-cautiousness	My Marist school encourages us to see reality from the viewpoint of another.	My Marist school warns us to be careful with different viewpoints.
Trust-cautiousness	In my Marist school we are encouraged to learn from making mistakes.	In my Marist school we are apprehensive about making mistakes.
Trust-cautiousness	In my Marist school I feel safe in relating to others.	In my Marist school I feel hesitant in relating to others.
Trust-cautiousness	In my Marist school, we have an attitude of being open to each other and sharing our feelings.	In my Marist school, we have an attitude of being discreet about sharing our feelings.
Institutional-Family spirit	My Marist school has detailed rules and regulations that are to be followed.	My Marist school has a framework of rules and regulations that guides in decision making.
Institutional-Family spirit	My Marist school is strict and formal.	My Marist school is flexible and homely.
Institutional-Family spirit	In my Marist school, people are told what to do, and how to do it.	In my Marist school, people are invited to try and do the right thing.
Institutional-Family spirit	In my Marist school, people work under the school leadership.	In my Marist school, the leadership, staff and students explore together the best way to do things.
Institutional-Family spirit	In my Marist school, the leadership determines how the school's Marist identity is to be expressed today.	In my Marist school, the school community determines how the school's Marist identity can be best expressed today.
Cognitive-personal	The leadership in my Marist school rewards people who follow directions.	The leadership in my Marist school empowers people to achieve the school's goals together.
Cognitive-personal	My Marist school teaches us in the first place to be smart and intellectual.	My Marist school teaches us in the first place to be compassionate and loving.
Cognitive-personal	In my Marist school being Catholic is all about giving consent to Church teachings.	In my Marist school being Catholic is about loving tenderly and walking justly with each other.
Cognitive-personal	In my Marist school, teachers direct students in their learning.	In my Marist school teachers accompany and guide students in their learning.
Cognitive-personal	In my Marist school people respond to life with their mind and intellect.	In my Marist school people respond to life with their heart.
Cognitive-personal	In my Marist school high academic results are the most important.	In my Marist school striving to develop each student's unique talents is the most important.
Cognitive-personal	My Marist school pursues social justice by analysing how to respond to theories of injustice.	My Marist school pursues social justice by relating face to face with the victims of injustice.
Recontextualised faith	In my Marist school we try out new and creative ways of prayer.	In my Marist school we use traditional prayers.
Recontextualised faith	In my Marist school religious art reflects present-day insights in living one's faith.	In my Marist school religious art reflects traditional insights in living one's faith.
Recontextualised faith	My Marist school wants to transform the Catholic faith tradition to make it relevant for people today and tomorrow.	My Marist school wants people to conform to the Catholic faith tradition of the past.
Recontextualised faith	My Marist school searches for new ways of bringing faith and life together.	My Marist school promotes traditional ways of living a faithful life.
Recontextualised faith	My Marist school explores how people's lived experience of life enhances their faith.	My Marist school has people conform to the fixed understandings and practices of Church tradition.
Recontextualised faith	My Marist school encourages new ways of interpreting the teachings of the Church.	My Marist school encourages people to accept the traditional teachings of the Church.

FIGURE 17 Marist Charism Scale survey items sorted according to the five dimensions

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