

THE TRAINING AND DEVELOPMENT OF ADULT RELIGIOUS EDUCATORS  
AND LEADERS FOR CANADIAN CATHOLIC PARISHES:  
A HISTORIOGRAPHICAL ANALYSIS 1983 TO 2011 AND FUTURE DIRECTIONS

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By

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## **Abstract**

The purpose of this study was to investigate what approaches to facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken in the 1983 to 2011 period. Drawing on educational scholarship, especially Lave and Wenger's (1991) work on communities of practice (CoPs), the objectives of this study were to analyze these past approaches with respect to their key features and processes, and to investigate the manner in which any of these approaches exhibited the characteristics of a CoP. Given a CoP's three structural elements of domain, community, and practice, and its key features of situated, contextual, and relational learning, an ancillary objective was also to consider the extent to which the CoP framework may be an appropriate approach to train and develop adult religious educators and leaders for different Canadian parish contexts.

This qualitative instrumental case study employed historical methodology and was guided by the constructivist paradigm. Documentary research and interviews were the two data collection methods in this study. The principal and major source of data were documents supplemented by interviews. This study had two phases of data collection. In the first phase, data from documentary sources were collected. In the second phase, to elaborate upon the documentary data, interviews were conducted with five research participants who were selected due to their diverse and extensive knowledge and experience relevant to the training and development of adult religious educators and leaders for Canadian Catholic parishes.

The findings showed approaches to training included non-formal lay ministry education programs, higher education opportunities, eclectic and fragmented approaches, and community-based strategies. Also, the findings revealed related challenges and concerns. The findings suggested the CoP approach may be one feasible community-based strategy to facilitate the training and development of adult religious educators and leaders. Insights from the CoP framework may offer a mechanism to facilitate this training and development, or from a community development perspective, mobilize existing, or even unidentified talents and gifts already present in the parish community. The CoP approach may be responsive to an individual parish's unique circumstances and needs, especially in the contemporary Canadian ecclesial and sociocultural context.

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Given that I reside in a province which had 20 residential schools, 10 of them operated by the Roman Catholic Church (TRC, 2011), and has one of the largest Indigenous populations in Canada, I followed the Canadian Catholic Church's responses to the Truth and Reconciliation Commission of Canada. Throughout my professional and academic life, I was privileged to interact with Indigenous Canadian colleagues and students and learn about Indigenous spirituality, thereby enriching my understanding of Catholicism. As a Roman Catholic Canadian of French descent and a lifelong resident of Saskatchewan, I acknowledge I live in the traditional territory of Treaty Six original homeland of the Neyinowak (Cree), Dakota, and Métis peoples.

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## Dedication

After the love that unites us to God, conjugal love is the greatest form of friendship. It is a union possessing all the traits of a good friendship: concern for the good of the other, reciprocity, intimacy, warmth, stability and the resemblance born of a shared life.

*Amoris Laetitia (The Joy of Love)*, para. 123  
Pope Francis, 2016

To Francisco, my beloved husband, my best friend and life companion, for his love, and constant encouragement and support through my Master of Education and Doctor of Philosophy programs, and through our journey of life together. I am so blessed! *¡Muchísimas gracias, amor de mi vida! ¡TE QUIERO MUCHO!*

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## **List of Abbreviations**

BMAS	Birmingham Mission Apprentice Scheme
CAQDAS	Computer-Assisted Qualitative Data Analysis Software
CARA	Center for Applied Research in the Apostolate
CC	Congregation for the Clergy
CCCCB	Canadian Conference of Catholic Bishops
CoP	Community of Practice
CREC	Centre for Religious Education and Catechesis
GDC	General Directory for Catechesis
LMEP	Lay Ministry Education Program
MFP	Ministries Formation Program
NORE	(Canadian) National Office of Religious Education
NTC	Newman Theological College
RCIA	Rite of Christian Initiation of Adults
SIRE	Summer Institute in Religious Education
WCCRE	Western Conference of Catholic Religious Educators

## CHAPTER ONE

### INTRODUCTION TO THE STUDY

Any faith community or religious group must be able to pass on its tenets, practices, and way of life or it will not endure. Therefore, religious education is one of the essential tasks of all faith communities. Religious education has been at the heart of the Catholic Church's (hereinafter referred to as the Church) identity and mission from its very beginnings (CC, 1997, para. 59). John Paul II (1988) emphasized, "First of all the Church is a teacher" (para. 61). Historically, Elias (2012) indicated, "Religious education of adults [was] the first endeavor of religious groups" (p. 5). In the Judeo-Christian tradition, even from a secular viewpoint, Knowles, Horton III, and Swanson (2005) acknowledged, "All the great teachers of ancient times . . . [including] the Hebrew Prophets and Jesus in Biblical times . . . were teachers of adults, not of children" (p. 35). It was worth noting the Church's canonical literature recounted only the education of adults, likely because in the early history of the Church Christian education was largely a matter of educating adult converts (Elias, 2002, pp. 1, 21).

Pope Francis (2013) set out his vision for the Church in *Evangelii Gaudium* (*The Joy of the Gospel*). *Evangelii Gaudium* (Francis, 2013) highlighted two key points. First, all members of the Church are called to engage in the Church's mission (Francis, 2013, para. 120). Second, Catholic adults need to continually mature in their faith through ongoing religious education (Francis, 2013, paras. 121, 160–161).

The Second Vatican Council (1962–1965) fostered a deeper awareness of the status and role of lay persons in the life and mission of the Church, both as members of the Church and of wider society, particularly through two of the Council's documents: *Lumen Gentium* (Second Vatican Council, 1964, *Dogmatic Constitution on the Church*) and *Apostolicam Actuositatem* (Second Vatican Council, 1965a, *Decree on the Apostolate of the Laity*). Based on several key ecclesial documents including *Evangelii Gaudium* (Francis, 2013), the Canadian Conference of Catholic Bishops (hereinafter referred to as the CCCB) (2016b) offered a reflection on the co-responsibility of lay persons in the Church and in wider society.

In the years following the Second Vatican Council, the Church, through a corpus of ecclesial documents, underscored the value and necessity of religious education for lay adults and there were efforts to bring adult religious education to the forefront (English, 2010, pp. 132–133; Vallabaraj, 2008, pp. 1, 4–7). This was religious education for adults who were not

being educated for formal ministerial offices or professional occupations in the Church. The *General Directory for Catechesis* (hereinafter referred to as the GDC), published in 1997, may be regarded as the culmination of the corpus of ecclesial documents concerning adult religious education and the Church's guiding document for adult religious education policy and practice in Catholic faith communities such as parishes (Dulles, 2002, p. 25; Groome, 2010, p. 11; Mongoven, 2000, pp. 81–84; Vallabaraj, 2008, p. 1). As a field of education policy and practice, this type of religious education for adults was non-formal or informal adult education and learning (Vallabaraj, 2008).

Five decades after the Second Vatican Council, *Evangelii Gaudium* (Francis, 2013) pointed out religious education for lay adults represented a significant pastoral challenge (para. 102). Also, D'Souza (2016) commented a pressing issue facing the Catholic community was the religious education of its adult members (p. 217). The GDC (CC, 1997) outlined two foundational and universal principles which may be regarded as educational policy guidelines for adult religious education. First, although the GDC (CC, 1997) remarked religious education of children and youth complements the religious education of adults, it emphasized religious education for adults is the chief form of Christian education, and in fact, is the axis around which revolves religious education for other age groups (paras. 59, 275). Second, the parish, embedded in the organizational structure of the Church, ought to be the primary venue for adult religious education (CC, 1997, para. 257). Although adult religious education can occur in the rich variety of Catholic institutions, associations, movements, organizations, and basic ecclesial communities (CC, 1997, paras. 253, 261–264), nonetheless the GDC (CC, 1997) emphasized there are no alternatives to the parish because it is the key form of faith community, and is the primary educational community for religious education (para. 262). Given these two foundational and universal principles for adult religious education policy and practice, it is implicit religious education for adults should be the norm in the parish and is carried out or coordinated by persons who have the appropriate training for their particular context and role (CC, 1997, para. 234).

Despite official declarations about the importance and primacy of religious education for adults in the parish, there is a significant gap between the existing policy in intention and actual policy implementation if adult religious education is considered through the lens of educational policy (Guba, 1984). Numerous scholars and practitioners in the field of adult religious education observed parish-based adult religious education did not receive the attention it truly



deserved and faced many difficulties and limitations, not only in Canada but also in other countries (Alberich & Vallabaraj, 2004; Cavadini, 2006; Ciangio, 2014; Elias, 1986; English, 1999a; Kuzmochka, 2014; Latsone, 2013; Mallon, 2014; Mulhall & Parent, 2013; Otero & Cottrell, 2013; Paprocki, 2015; Regan, 2002; Regan, 2003a; Regan, 2003b; Regan, 2010; Stegu, 2015; Vallabaraj, 2008).

Several Catholic scholars highlighted communicating and transmitting the Christian faith was one cornerstone of parish life (Coriden, 1997, p. 39; Groome, 2011, pp. 165–199; Jónsson, 2011, pp. 51, 60–64). Given the importance of the Church’s teaching function as an integral dimension of its mission (CC, 1997, para. 59), the parish, a cell of the Church, may be considered to be an educational organization or an educational setting and learning environment (Groome, 2011, pp. 193–198; Jónsson, 2011, pp. 50–52, 63–64; Regan, 2003b, pp. 37–48; Schuttloffel, 2011, pp. 285–288).

Even though *Evangelii Gaudium* (Francis, 2013) did not use the discourse of organizational studies and organizational change but parallel theological language, it was very clear that Catholic faith communities such as parishes were being asked to review and assess their pastoral practice with the underlying idea that it may require a different approach in the contemporary sociocultural environment (paras. 27, 33; Clifford, 2015). Moreover, *Evangelii Gaudium* (Francis, 2013) insisted this renewal cannot be deferred (para. 27). Canadian Catholic leaders, including bishops, clergy, and lay persons, considered the meaning and implications of the compelling vision *Evangelii Gaudium* (Francis, 2013) had set out for the renewal of the Church, and of the parish, one institutional expression of the Church.

In light of *Evangelii Gaudium* (Francis, 2013) the CCCB, recognizing profound changes were being called for, offered its reflections on the role of the parish in contemporary Canadian society pointing out, “It is through the parish most Canadians experience the Catholic Church” (CCCB, 2014, p. 1 (sec. 1)). The CCCB (2014) remarked this may be an opportune time to “refocus attention on the true mission of the parish and the diocese” (p. 2 (sec. 2)). Also, the CCCB (2016b) highlighted, “The parish is a fundamental unit in the Church . . . [and it is] a locus for preparing the laity and clergy to exercise a co-responsibility for the life of the Church in the world” (p. 5 (sec. 10)). The CCCB (2014) indicated three distinct but interrelated areas in which parishes will have to find new approaches in the contemporary Canadian sociocultural milieu (p. 5 (sec. 8)). These three activities can be described as outreach, religious education,

and pastoral life.

Regarding adult religious education, one Canadian archbishop stated, “The real challenge is adult catechesis, we keep on forgetting that” (Gyapong, 2011, p. 10), and implicitly acknowledged the great challenge of adult religious education in many parts of Canada (Gyapong, 2013, p. 10). Another Canadian archbishop, in an address to the archdiocese, stated, “Leaders must be found and formed if faith is to be proposed and shared . . . . There is an urgent leadership vacuum in the area of adult faith formation”, and indicated this is one priority that has already surfaced in the Church (Mancini, 2014, pp. 10, 12). The lack of well-prepared adult religious educators and leaders, and challenges in providing adequate training and leadership development to equip persons to competently engage in parish-based adult religious education work are long-standing concerns in the Canadian Catholic context (CCCB, 1986; CCCB, 1993; CCCB, 2011).

### **The Contemporary Canadian Catholic Context**

The CCCB’s (2014) reflections about the parish took into account that in general parishes were now situated in the context of complex and significant sociocultural and demographic changes in Canadian society, and also within the changing religious environment including a significantly changed Canadian Catholic cultural environment (Bibby, 2017; Bibby & Reid, 2016; CCCB, 2013; CCM, 2016; Dawson & Thiessen, 2014; D’Souza, 2012; Fay, 2009; Kim, 2014; Noll, 2015; Pew Research Center, 2013). Thus, the Canadian parish in the 21st century exists in a complex environment in which to engage in adult religious education that is responsive to a variety of contemporary concerns and needs.

Canadian Catholics appear to be interested in or open to religious education in the parish milieu. One Canadian diocese reported 97% of respondents in a diocesan survey rated adult religious education as important, and recommended the diocese foster training and developing religious educators and leaders for its parishes (Roman Catholic Diocese of Victoria, 2010, pp. 18, 28, 51). The Catholic Leadership Institute (2016), based on feedback from 764 participants in one Canadian archdiocese (p. 3), reported Catholic adults “would like to see more adult education and catechesis . . . . [and] desire a more uniform formation focusing on what it means to live a Catholic life” (p. 4). Also, the participants’ feedback indicated religious education was “appreciated as well as something that needs to be improved and prioritized” (Catholic Leadership Institute, 2016, p. 7). Bibby and Reid’s (2016) cross-Canada survey of

3,000 Canadians, including over 1,000 Catholics, portrayed a complex, and sometimes perplexing, picture of the current state of Catholicism in Canada which may have implications for engaging in adult religious education. The findings from this survey, undertaken in 2015, suggested that even though many Catholics may seem distant from the institutional Church, this did not mean people were disinterested in spirituality or faith matters or have completely lost their sense of being part of the Catholic community and may be open to greater engagement with the Church. Therefore, addressing the task of finding and training parish-based adult religious educators and leaders who are responsive to this population is a pressing issue (Bibby, 2017; Bibby & Reid, 2016, pp. 52, 106–107, 121, 126–141).

The Church emphasized parents are the primary religious educators of their children (Catholic Church, 1993, paras. 2221–2223; CC, 1997, paras. 221, 226–227, 255). In fact, the role of parents in their children’s religious education was of such importance it was almost impossible to provide an adequate substitute (Catholic Church, 1993, para. 2221). Therefore, religious education is essential to help parents fulfil their obligations for the religious education of their children (D’Souza, 2016, p. 217). Elias (2012) commented:

Conducting education of children requires the previous religious education of adults. The main responsibility for the education of children lies in the hands of adults who can do this competently only if they are committed to and well versed in their religious faith. (p. 5).

Thus, even in Canadian jurisdictions that have publicly or privately funded Catholic schools which play an important role in the religious education of children and youth, parents, nonetheless, are the primary religious educators of their children.

Current immigration trends are contributing to Canada’s increasingly diverse civic communities which are reflected in parishes representing the presence of the global Church in Canada. Bibby (2017) indicated Canadian Catholic parishes were declining or were remaining the same at the beginning of the 21st century. However, newcomers to Canada, many of whom are devout Catholics from Africa, Asia, and Latin America, are contributing to the growth and stability of parishes (Bibby, 2017). Given Canada’s current immigration trends, the large infusion of Catholic newcomers will have a significant impact on parishes in the foreseeable future (Bibby, 2017; Bibby & Reid, 2016, pp. 49–52, 107–111, 121–122, 125–126, 141, 150). In particular, Bibby and Reid (2016) remarked immigration “will produce an ever-diverse

leadership at many levels, starting with local parishes” (p. 150). Therefore, given the changing demographic composition of parishes, it is reasonable to conclude newcomers will play a larger leadership role in parish life including in the area of adult religious education.

The Canadian Catholic Church exists in a culturally pluralistic and democratic society. The social and political challenges of religious pluralism, and the philosophical positions of those with different worldviews, opinions, and sensibilities have implications for how Catholic adults understand their faith, live, and interact peaceably and respectfully in relation with others who do not share the same beliefs or convictions (CCCB, 2013, pp. 1–4 (sec. 1–6)).

A significant and current focus of adult religious education in the Canadian Catholic context is to implement one of the Truth and Reconciliation Commission’s *Calls to Action* (TRC, 2015b). To foster reconciliation with Canada’s Indigenous Peoples, church parties to the Settlement Agreement were called upon “to develop ongoing educational strategies to ensure that their respective congregations learn about their church’s role in colonization, the history and legacy of residential schools, and why apologies to former residential school students, their families, and communities were necessary” (TRC, 2015b, para. 59).

Along with the sociocultural changes in Canadian society and a significantly changed Catholic cultural environment, major changes have occurred in parish life which may have many implications for engaging in adult religious education. Traditional paradigms of parish organization and life have changed and will continue to change (CCCB, 2014, p. 2 (sec. 2)). The CCCB (2014) highlighted the status quo is no longer possible due to dwindling human and financial resources (p. 3 (sec. 5)). The reality is major changes in parish life are certainly on the horizon, and reconfiguration and reorganization have already happened in many places (Agren, 2013; CCCB, 2014; CCM, 2016; Mallon, 2014; Pagé, 2012; Routhier, 2006; Swan, 2013a).

Traditionally, a priest was the formal leader of the parish. However, aging priests and relatively few young men choosing the priesthood, especially in western cultures, means that it is not likely the shortage of priests will be alleviated and may worsen. Therefore, the development of vibrant parish communities by necessity will be rooted in local lay leadership and the commitment and participation of all parishioners. The evolving changes in parish leadership and life implicitly calls for collaboration and collaborative leadership.

However parishes may evolve in the future there is always the need for adult religious educators and leaders who have the doctrinal knowledge, adult education and educational

leadership competencies, and personal qualities and relational skills to communicate and transmit the Catholic faith and facilitate the process of adult religious education in the parish within the broader contemporary sociocultural environment. The work of adult religious education is a unique service carried out within the faith community always in cooperation and partnership with the diocesan bishop and others who engage in religious education work, and in coordination with other persons and leaders involved in different types of pastoral activity and service in the parish and diocese (CC, 1997, para. 219). Scholarly research potentially can support and serve the needs of the Canadian Catholic Church in the area of adult religious education, both theoretically and practically.

### **Researcher Background**

My interest in parish-based adult religious education emerged from my personal background and experiences as a Roman Catholic. Like many Roman Catholics of my generation and sociocultural background, my religious education amounted to that which I received during childhood and early adolescence from 1962 to 1972 while attending a Catholic school. Routine for someone of my background, I was baptized as an infant and received the initiatory sacraments of Reconciliation, Eucharist, and Confirmation in the primary grades.

My religious education in the Catholic faith straddled two distinct periods with respect to the content and methodology of teaching the Catholic faith. Up to 1968, I received traditional age-appropriate religious instruction for children typical of the pre-Vatican II period. Profound changes occurred in religious education practice following the Second Vatican Council. In the aftermath of the Second Vatican Council, during the years of my early adolescence when I attended a Catholic school, I recall new approaches to religious education were implemented which significantly differed from my early religious education with respect to methodology and content. I attended a public school for my senior high school years, which in effect terminated my religious education.

Smith, Longest, Hill, and Christoffersen (2014) described my generation the “lost generation” in light of the weaknesses of passing on the Catholic faith to my peers following the Second Vatican Council (pp. 24–28). During my adulthood, I attended weekly Mass but was not especially well educated and formed in my faith tradition although I was highly educated and professionally employed in higher education developing and delivering educational support services to a highly diverse student body with varied educational backgrounds, goals, and needs.

In the early 2000s, spirituality became more important to me, and I was naturally inclined to turn to my own faith tradition. During this period, I became acquainted with a Catholic theologian who introduced me to the study of Catholic theology. Eventually, in my desire to learn more about and deepen my understanding of my faith tradition, I completed the distance education Certificate in Lay Ministry program through St. Francis Xavier University (Antigonish, NS) in 2006, and engaged in extensive independent self-directed learning and study in many different areas of Catholic history and thought.

The GDC (CC, 1997) indicated Catholicism has a rich treasury and tradition with a full range of spiritual and social teachings (paras. 141, 201). Catholicism's sacramental view of all aspects of life and liturgical traditions pointed towards the sacred and transcendent dimensions of our existence. Over the course of its history, the Church had a legacy of caring for the poor, the disadvantaged, and the sick which continues today. The body of Catholic social teaching, based on key foundational principles, fostered building a more humane and just world for all persons regardless of creed and without discrimination of any type. Being immersed in a western secular culture, through my studies I gradually came to appreciate the wisdom of my Catholic heritage and value the Church's teaching function. At its best in theory and practice, adult religious education has the capacity to promote a holistic faith and spirituality which Groome (2011) proposed, "is to be *lived, living, and life-giving* for self, others, and the world" (p. 109) and engages the head, heart, and hands (pp. 19–50, 111–120). Also, I saw the educational potential of adult religious education in the other great world religions which at their heart, share altruistic universal ideals, tenets and moral values, not only with Catholicism but with each other, despite differences in creed and religious practices.

As an extension of my secular professional education in adult education and related work experience, I developed a keen interest in adult religious education. Prior to commencing graduate level studies in 2010, between the years 2003 to 2009, I became progressively familiar with a variety of Catholic documents and writings, and also writings by authors who belonged to other Christian denominations, relevant to adult religious education through both academic and self-directed study. One of my St. Francis Xavier University courses was a self-directed study project about adult religious education in the Catholic context which I designed and executed. I also read literature about adult religious education for lay people in the Jewish and Islamic traditions, both of which have strong traditions of adult religious education.

With approaching retirement from my profession, I considered pursuing my interest in adult religious education in a purposeful way. I realized I had an array of transferable professional competencies and skill sets, acquired through my previous education and occupational experience, and other rich life experiences which could be relevant to engaging in and facilitating adult religious education in the parish or in other venues where non-formal or informal adult religious education was an integral part of their activities. With further education and appropriate support, I believed I could be capable of giving dedicated service in this area of endeavor.

My interest in pursuing adult religious education work was also motivated by my participation in a variety of adult religious education activities and programs in the parish milieu, which with few exceptions, were disappointing for many different reasons. My perspective was not one of a professional religious educator but of one in the pew who has reflected on my personal experiences and observations, and of those who privately shared their own experiences and observations with me, not only from my own diocese but also from other Canadian dioceses.

Given my expanding knowledge about adult religious education theory and practice, and the many resources which could be drawn upon, I began to ask why there seemed to be such a gap between what the Church advocated and envisaged for parish-based adult religious education and its actual practice. Informed by both academic and self-directed studies during this period, my questions sprang from my observations and reflections about adult religious education practice and leadership in the parish context.

Simply put, in my experience, I concluded there was a lack of persons who had the doctrinal knowledge, adult education and educational leadership competencies, and personal qualities and relational skills to transmit the Catholic faith and facilitate the process of adult religious education in the parish within the broader contemporary sociocultural environment. At the same time, I realized it was unlikely someone could teach and mentor me in the various dimensions of adult religious education work in the parish milieu.

I explored options for graduate level education offered by Catholic theological institutions in Canada, the United States, and England. I was not keen on a completely online program or a hybrid program which offered online and face-to-face courses. In my view, the most ideal option was to relocate to another city and be a full-time student at a theological institution. However, this was not a suitable option for me because I was unwilling to have a

long-distance marriage for significant periods of time nor, for professional reasons, was it feasible for my husband to relocate.

In late 2009, unexpectedly, an alternative educational opportunity in my home city presented itself. In September 2010, I commenced graduate level studies in the Department of Educational Administration at the University of Saskatchewan. The Church welcomes contributions from the education, social, and communication sciences which can be drawn upon to inform and enrich adult religious education theory and practice without compromising Catholic teachings (CC, 1997, paras. 147–148, 242–243; Otero, 2016; Otero & Cottrell, 2013). Although the University of Saskatchewan is a secular university, faculty in the Department of Educational Administration, Catholic and non-Catholic alike, supported my academic work. I found a respectful and supportive academic environment in which to pursue my interest in adult religious education through the lens of educational administration and leadership.

### **Background to the Problem**

Considering the parish an educational organization which engages in non-formal or informal adult religious education, insights from the body of theory about educational administration and leadership, which includes, for example, community development and capacity building, educational leadership development, and organizational change and renewal, potentially could contribute to improving the practice of adult religious education in the parish milieu.

The CCCB demonstrated an interest in developing adult religious education in Canada in the 1983 to 2011 period. The adult portfolio within the CCCB's National Office of Religious Education (hereinafter referred to as NORE; currently Office for Evangelization and Catechesis) was established in 1983 which "provided that staff could be exclusively allocated to the development of adult religious education in Canada at the national level" (Chafe, 1994, p. 12). Between the years 1986 to 2011, the CCCB issued three major publications pertinent to parish-based adult religious education in the Canadian Catholic context (CCCB, 1986; CCCB, 1993; CCCB, 2011).

The first publication, *Adult Faith, Adult Church: A Report on the Recommendations of the National Advisory Committee on Adult Education* (CCCB, 1986) focused on pastoral planning issues relevant to adult religious education practice. The purpose of *Adult Faith, Adult Church* (CCCB, 1986) was to gather information from a variety of sources and "to analyze what



was happening in adult religious education in Canada . . . with the goal of recommending directions that would guide our pastoral activity in this area” (p. 9). The second publication, *Pathways to Faithfulness: Developing Structures Which Support Catechetical Ministry with Adults* (CCCB, 1993) was a report of Canada-wide research findings of how adult religious education was structured across Canada and the major issues that emerged from these findings.

Eighteen years later, the third publication, *On Good Soil: Pastoral Planning for Evangelization and Catechesis with Adults* (CCCB, 2011) was issued following the CCCB’s decision, at its plenary assembly in 2007, to develop a guide for adult religious education (CCCB, 2011, p. 14 (sec. 2)). *On Good Soil* (CCCB, 2011) was based on anecdotes, not empirical research (Kuzmochka, 2014, p. 10).

*On Good Soil* (CCCB, 2011) pointed out positive developments in the area of adult religious education in the Canadian Catholic context (p. 36 (sec. 17)). However, parishes may face various difficulties in engaging in adult religious education that were not the same everywhere nor existed everywhere within Canada or at the same time. Based on consultations from across Canada, *On Good Soil* (CCCB, 2011) identified six key overlapping institutional and human resource challenges in the contemporary Canadian Catholic context in providing religious education for adults (CCCB, 2011). These challenges included:

- the predominant focus on religious education for children (CCCB, 2011, p. 37 (sec. 17));
- the lack of structures to train and develop educational leaders in adult religious education at the parish, diocesan, and national levels of the Catholic Church in Canada (CCCB, 2011, p. 37 (sec. 17));
- the need for clergy, religious educators, and other pastoral leaders to develop skills for collaboration to advance adult religious education (CCCB, 2011, p. 38 (sec. 18));
- the difficulty of attracting new lay leaders, and by implication, educational leaders in parishes (CCCB, 2011, p. 180 (sec. 139));
- the need to build and maintain an infrastructure to implement adult religious education in faith communities such as parishes (CCCB, 2011, p. 183 (sec.142)); and
- the need to increase the number of religious educators who can work with adults (CCCB, 2011, p. 194 (sec. 155)).

It was important to note the two previous CCCB publications regarding the work of adult religious education identified similar institutional and human resource challenges. In particular,

leadership development in adult religious education was a major concern (CCCB, 1986, pp. 61–62; CCCB, 1993, p. 55). Kuzmochka's (2014) Canadian based research findings indicated the need to train and develop adult religious educators capable of engaging in and leading adult religious education in parishes (pp. 160, 224, 229, 231–232). These concerns implicitly raised the questions of how adult religious educators and leaders can be trained and developed, and how adult religious education can be advanced in the parish milieu.

In response to *Evangelii Gaudium* (Francis, 2013) as relevant to the Canadian context, Durocher stated most parishes and dioceses in Canada were shrinking, resulting in reduced financial resources (Swan, 2013b, p. 9). In particular, northern dioceses in Canada, with large populations of people of Indigenous ancestry who are Roman Catholic, face immense financial, social, and personnel challenges (Gyapong, 2015b, p. 10). Reimer and Hiemstra (2015) reported on the declining incomes of Catholic and Protestant churches and the rise of part-time employment in Canadian Christian churches and discussed possible reasons and the implications of this trend for Christian churches. Reimer and Heimstra's (2015) analysis demonstrated a move towards part-time staffing was prominent in Catholic parishes and implied women may be overrepresented in part-time positions (p. 368).

The contemporary Canadian reality is the cultural, educational, ecclesial, and religious education backgrounds of the Catholic population is not similar or consistent. People will have their individual stories, in all their complexity, and different levels of association with and participation in parishes. This is a very challenging context in which to engage in adult religious education and to be responsive to very diverse needs and situations (CCCB, 2011, pp. 206–207 (sec. 167)). It requires parish leadership to accommodate the needs of people from very diverse backgrounds and experiences of Catholicism whose prior knowledge and experience of Catholicism cannot be assumed (Rymarz, 2010, pp. 758–764).

Historically Canadian Catholic parishes have experienced multiple challenges in engaging adult religious education practice as outlined in the CCCB's three major publications about adult religious education (CCCB, 1986; CCCB, 1993; CCCB, 2011), especially with respect to the lack of well-prepared personnel and leaders to engage in adult religious education. It is evident the training and development of adult religious educators and leaders in the Canadian Catholic context has been a significant long-standing concern. This concern is now situated within the context of the potentially varied adult religious education desires and needs of

different groups of adults given the many sociocultural and demographic changes in Canadian society and adults' diverse backgrounds and experiences of Catholicism. Furthermore, the lack of adult religious educators and leaders with the requisite competencies and qualities was compounded because correlatively there could be a lack of qualified experienced people to train and mentor others who potentially could engage in parish-based adult religious education work.

Given the long-standing, and now pressing, need to train and develop adult religious educators and leaders for Canadian Catholic parishes, an investigation of past approaches to facilitate the training and development of adult religious educators and leaders between 1983, the year the adult portfolio within NORE was established, and 2011 when *On Good Soil* (CCCB, 2011) was published, merited investigation. Relatedly, an investigation of these approaches may uncover approaches which may be worthy of deeper consideration to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes.

### **The Purpose of the Study**

The purpose of this educational historiographical instrumental case study was to investigate what approaches to facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period. Drawing on educational scholarship, especially Lave and Wenger's (1991) work on communities of practice (CoPs), the secondary objective of this study was to analyze these past approaches with respect to their key features and processes and investigate if any of these past approaches exhibited the three structural elements of a CoP, domain, community, and practice, and its features of situated, contextual, and relational learning. Relatedly, Otero and Cottrell (2013) specifically explored the CoP framework conceptually as one potential approach to train and develop adult religious educators and leaders for Catholic faith communities, especially parishes, in the Canadian Catholic context. Therefore, an ancillary objective was to consider the extent to which the CoP framework may be an appropriate approach to train and develop adult religious educators and leaders for Canadian Catholic parishes.

### **Research Questions**

The research questions which guided this study were:

1. What approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period?

2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

### **Significance of the Study**

This study was a unique disciplinary and methodological approach to investigate one aspect of the Church's teaching function. Educational historiographical and empirical research about topics related to non-formal or informal congregation- or parish-based adult religious education in Christian denominations is very limited. Situated within the discipline of educational administration and leadership, this historical inquiry into approaches for facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes in the 1983 to 2011 period addressed a gap in knowledge. This study also identified challenges in training and developing adult religious educators and leaders, and suggested the CoP framework may be one approach to facilitate the training and development of adult religious educators and leaders in the contemporary Canadian Catholic context.

This study may also make a scholarly contribution to the fields of non-formal and informal adult education and learning, especially adult religious education. Also, this study may make a contribution to the broad area of organizational theory which may be helpful to understand the Church as an organization especially with respect to adult religious education policy and practice.

The scholarship of educational administration and leadership is characterized by various perspectives and methodological diversity (Newton & Burgess, 2015, pp. 1–8). The employment of educational historiography contributed to such methodological diversity. This study drew upon historical and social scientific methods in conducting documentary research which was supplemented by interviews.

This study may also be of interest to the wider Catholic community because the training and development of adult religious educators and leaders has been an ongoing global concern (Alberich & Vallabaraj, 2004, p. 12; Biyne, 1995, p. 6; CELAM, 2007, p. 99 (sec. 296); Chafe, 2000a, pp. 4–8; Chafe, 2000b, pp. 4–5; Devitt, 2009, p. 4; Shore, 1993, p. 11).

### **Description of the Study**

This qualitative instrumental case study employed historical methodology and was guided by the constructivist paradigm. Documentary research supplemented by interviews were the two data collection methods in this study. The principal and major source of data were documents. Appropriate primary and secondary published written documents and secondary unpublished written documents were identified, selected, accessed and collected. The documentary data sources were supplemented by individual interviews with five research participants. The research participants were selected through a purposeful sampling strategy (Patton, 2015, p. 268).

This study had two phases of data collection. In the first phase, data from documentary sources were collected. An analysis of this collected data was undertaken to review preliminary findings. Based on these preliminary findings, to supplement and elaborate upon the documentary data, interview questions for the second phase of data collection were developed. Using an interview guide (Patton, 2015, p. 439), a *shorter case study* interview was conducted (Yin, 2014, p. 111).

Research for this study thus consisted of two discrete sets of data. The data in this study were coded manually rather than using computer-assisted qualitative data analysis software (CAQDAS). Systematic data analysis involved processing the data through first and second cycle coding processes (Saldaña, 2016). First cycle holistic coding was the basic groundwork for second cycle coding, pattern coding (Saldaña, 2016, p. 166). Pattern coding grouped the codes into a smaller number of categories from which the emergent and major themes were generated (Saldaña, 2016, p. 236). Lincoln and Guba's (1985) evaluative criteria for qualitative studies, credibility, transferability, dependability and confirmability, each with specific strategies, were used to evaluate the trustworthiness of this study.

### **Delimitations of the Study**

Seymour (2006) stated, "Research in religious education combines theological understandings, faith commitments, religious traditions, historical analysis, religious practices, and educational research. . . . Religious education research and teaching is very particular, rooted in particular faith communities, particular traditions, and particular practices" (p. 1). Catholic theology and education are both specialized disciplines, each having many sub-fields and cognate disciplines, and are inherently interdisciplinary and multidimensional. It is possible to

reflect on adult religious education through multiple lenses with each one contributing insights to a dimension of adult religious education work.

Even though the Church sets the direction for adult religious education by outlining its purpose, tasks, and general content (CC, 1997, paras. 80–87, 114–115, 173–175), the Church did not suggest any particular methodologies or strategies wisely recognizing the great diversity of contexts and circumstances in which the Church carried out its teaching function (CC, 1997, para. 148). This study did not address specific theological and pedagogical approaches to adult religious education in the parish milieu, and the content, means, and process of adult religious education because these may be determined by and adapted to the exigencies of any particular situation taking into consideration a myriad of theological and pastoral issues and needs. Nor was this dissertation a theological treatise or about Catholic doctrine per se.

With respect to considering the Church as an educational organization, this study was situated in the discipline of educational administration and leadership. The specific focus of this study was examining approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes and to explore drawing upon the insights of CoPs.

Catholicism is a worldwide faith and the Church is a global organization. However, each country has its unique historical and sociocultural context, and pastoral concerns. Therefore, this study was limited to the Canadian Catholic context. This study was framed between 1983, the year the adult portfolio within NORE was established, and 2011 when *On Good Soil* (CCCB, 2011), the CCCB's last major publication about adult religious education, was published.

Canada is officially a bilingual country and this is reflected in the organization and the structures of the CCCB. Even though there may be overlap between the English and French sectors regarding adult religious education matters and concerns, with respect to religious education, historically, the CCCB has an English sector commission and religious education office. Therefore, only English-language national level publications issued during the 1983 to 2011 period comprised a portion of the documentary sources utilized in this study. However, with this being said, these documents were representative of the Canadian experience from coast to coast including the experiences of the Church in Québec, the Canadian far north, and Canada's Indigenous Peoples. Relatedly, the five research participants represented the English sector of the Canadian Catholic Church.

### **Limitations of the Study**

This study was subject to the following limitations:

1. Although I made every effort to be explicit about my positionality, I was the sole and primary research instrument for all aspects of the research process in this qualitative study. Therefore, all the data were mediated through me.
2. Although the Church is a global organization, this case study was limited to English-speaking Canada; therefore, the findings may be limited in their general transferability. Also, I did not find similar studies in other countries to compare with the Canadian situation.
3. It is worth noting a committee of the Assembly of Catholic Bishops of Québec (CCM, 2016) issued a document in both French and English regarding the transformation of parish communities and the need for adult religious education in light of *Evangelii Gaudium* (Francis, 2013). Also, it should be noted French Canadian Catholic theologians have made scholarly contributions in the field of adult religious education (Lefebvre, 2012; Mager, 2016).
4. Interviews were limited to persons who are currently or were engaged in a leadership capacity in the adult religious education enterprise in the Canadian Catholic context. Therefore, the study was limited because perceptions of parishioners and various stakeholders were not included. For example, educators and leaders in Catholic K–12 and higher education institutions, and personnel and members in the wide array of Catholic organizations, associations and movements which occasionally and primarily contribute to informal adult religious education in the parish milieu through the distribution of literature were not included. Even though these various stakeholders may have an interest in parish-based adult religious education, the rationale for excluding them was they were not directly involved in any ongoing adult religious education work or leadership in the parish milieu.
5. The interview questions could be open to interpretation by the research participants.
6. The interview format was a shorter case study interview which was approximately a one-hour focused conversation and there was only one opportunity to interview each research participant.

### **Assumptions**

1. It was assumed I have both an academic and practitioner mind-set with respect to addressing educational challenges and issues, and proposing and implementing potential solutions with

respect to adult religious education practice. In other words, scholarly activities and educational practice mutually benefit and inform each other.

2. It was assumed all the primary and secondary published documentary data sources, and the secondary unpublished documentary data sources were authentic and trustworthy.
3. It was assumed the premise of this study was based on the two foundational and universal principles that religious education for adults is the principal form of Christian education and the parish is the primary educational community for adult religious education (CC, 1997, paras. 59, 257, 262, 275).
4. It was assumed the five research participants are committed to the Catholic faith and in good standing with the Catholic Church. Also, the research participants, due to their diverse and extensive knowledge and experience relevant to the training and development of adult religious educators and leaders for the parish milieu during the 1983 to 2011 period, were deemed appropriate persons to provide data.
5. It was assumed a reasonable level of mutual respect, trust, and rapport was established between the research participants and myself to facilitate open and honest sharing of information and experiences in the interview.

### **Definitions Used in the Study**

The terms used in this dissertation are defined below.

**Adult religious education.** Depending on the linguistic and cultural context, religious education in the Catholic tradition can be “known by different names . . . . The terminology can be grouped around four semantic nuclei: catechesis, faith, religion and education” (Alberich & Vallabaraj, 2004, pp. 70–72), each with their own nuanced meanings and characteristics. Also, the term adult faith formation is commonly used. The term *religious education* is widely used at international levels. This term “includes a great variety of practices and activities . . . . It indicates the entire range of educational processes related to the religious dimension in general” (Alberich & Vallabaraj, 2004, p. 72). Informed by the principal sources of the Catholic Church’s teaching, I defined adult religious education as an integrated process of adults learning and practicing the various dimensions of the Christian faith (CC, 1997, paras. 84–87, 94–97, 111–115; Dulles, 2002, pp. 28–34; ICC, 1990, paras. 38–46). Also, embedded in my definition was the recognition that the Church’s teaching function, with respect to communicating and teaching the Christian faith, has both an evangelical and educational mission which are not



mutually exclusive (CC, 1997, paras. 46, 48, 59). Therefore, except for direct quotations which used another term the phrase *adult religious education*, understood in this comprehensive sense, and incorporating all the activities, practices, and processes of adult education and learning, whether formal, non-formal or informal education, embedded in the phrase adult religious education was used in this dissertation.

**Diocese/Parish/Archdiocese/Archbishop.** With very few exceptions, administratively and structurally, the Catholic Church is divided into territorial jurisdictions called a diocese, headed by a bishop, which is subdivided into individual Catholic communities called parishes (McBrien, 1994, p. 418). An archdiocese, headed by an archbishop, is the principal diocese in a regional cluster of dioceses and is usually centered in a larger more important city or town in the given area (McBrien, 1994, p. 92). Within the official institutional governance structure of the Church, each bishop is autonomous in the service of the diocese. Under the authority of the diocesan bishop, the pastoral care of the parish is entrusted to a priest, who is the designated pastor, or when circumstances require it, to another person who is not a priest such as a deacon or a lay person or a community of such persons (Coriden, 1997, p. 61). In situations where the parish does not have its own priest-pastor, the bishop appoints a priest who supervises the pastoral care of the parish (Coriden, 1997, p. 61).

### **The Researcher and the Qualitative Research Process**

Several scholars noted qualitative research, including educational history, is often tied to the researcher's personal biography and experience (Denzin & Lincoln, 2005, p. 375; Henry, 2006, p. 336; Rury, 2006, p. 324; Swinton & Mowat, 2016, p. 57). In qualitative research, the choice of topic, approach to the collection, analysis and interpretation of the data, and the presentation and discussion of the findings may be influenced and shaped in innumerable ways by the researcher's personal background, beliefs, experiences, and values. Court's (2008) research findings revealed religious qualitative researchers' decision to undertake their particular study was partly motivated by their personal, cultural, or religious experience, and they inevitably brought their own experience and sensibilities to the qualitative research process.

Undoubtedly, there was a connection between my personal background and experiences as a Roman Catholic and the subject of my doctoral research study. Richardson (2014) discussed the inevitability of the Catholic researcher bringing their own unique history and experiences of Catholicism when conducting social science research in areas of Catholic life and practice

(pp. 65–66). It was important to recognize and acknowledge the impact of my personal history as a Roman Catholic which was profoundly shaped by the wider sociocultural, historical, and ecclesial context within which I was situated, and my current identity, beliefs, and values as a Roman Catholic. All these factors were inextricably intertwined with respect to balancing subjective experience and objective analysis in this case study regarding the training and development of adult religious educators and leaders (Court, 2008, p. 410).

Given the central role of a qualitative researcher in all aspects of the research process, Guba and Lincoln (1981) discussed the crucial importance of appreciating and taking into consideration the unique character and potential impact of the “human as instrument” in conducting the various processes of a qualitative study as compared to scientifically oriented studies which did not have the same degree of human judgment (pp. 128–152). Lincoln and Guba (2000) stated, “Reflexivity is the process of reflecting critically on the self as researcher, the ‘human as instrument’” (p. 183). Sandelowski and Barroso (2002) highlighted reflexivity involved the ability to reflect both inwardly toward oneself, and as well, outwardly to the particular historical context and sociocultural location the qualitative researcher was situated in and other forces which may shape the study (p. 216). Swinton and Mowat (2016) also emphasized the importance of reflexivity in theologically based qualitative research (pp. 56–58).

Regarding historical research in religious education, Schmidt (1985) highlighted the importance of the historian being aware of and acknowledging their subjectivity and biases especially with respect to selecting or rejecting data and analyzing and interpreting data (pp. 350, 353–354). At the same time, Schmidt (1985) emphasized the historian of religious education was called to judgments of balance, fairness, and civility (p. 369).

In conducting historical research in religious education it mattered a great deal *who* the qualitative researcher was. Therefore, I needed to explicitly explain my frame of reference, that is, my positionality, as relevant to this study and consider how my positionality may have potentially influenced the research process. My epistemological orientation as a social constructivist, my motivations to undertake this study, my status as an insider or outsider, my operative understanding of the practice of collaborative educational leadership in the Church, and women in educational leadership roles were the key elements of my positionality.

### **Social Constructivism**

As a qualitative researcher using the constructivist paradigm, I needed to acknowledge

the implications of my subjectivity and my involvement in the construction and interpretation of data as it also may have reflected my temporal historical, sociocultural, and situational locations as I interacted with the data and conferred meaning upon it (Creswell, 2013, p. 25; Denzin & Lincoln, 2011, p. 11). I saw the Church as having two concurrent realities, a spiritual one, and a human one (Catholic Church, 1993, paras. 770–771). With this being said, I considered myself a social constructivist.

As a lifelong Roman Catholic at the threshold of entering the seventh decade of my life, over the years I came to appreciate individual Catholics, parishes and other types of Catholic faith communities have always existed in a historical and sociocultural context. Informed by the various sources of the Church's teaching, in my experience, how different aspects of the Catholic faith were understood, interpreted, emphasized, and lived out by an individual, including myself, or any particular faith community were socially constructed by human beings as they interacted with each other and their unique sociocultural environment. Individuals and faith communities developed subjective understandings and meanings of what it meant to be Catholic based on their experiences in their time and place. By no means did this view imply a critique of how any person or faith community understood Catholicism but merely an acknowledgement and appreciation of how human beings tried to understand and live the Catholic faith in their time and place.

### **Motivations to Undertake the Study**

My motivation to undertake this study came from two places. First, my motivation was partly based on my experiences and observations as an adult Catholic, and those of others who privately shared their experiences with me. A recurring theme was the parish milieu was not always conducive to fostering adult religious education or accompanying individuals in a caring and supportive manner in their faith journey given the great diversity of individuals' religious and cultural backgrounds, knowledge, and experiences of Catholicism. One significant factor which appeared to contribute to this situation was the lack of persons who had the appropriate competencies to facilitate the process of adult religious education which was pastorally responsive to individuals' and families' circumstances. Second, and relatedly, I wanted to consider how adult religious educators and leaders could be trained and developed for the parish milieu and contribute to the Church's teaching and pastoral functions which were responsive to adults' particular needs and interests at any stage in their faith journey.

## **Insider-Outsider Perspectives**

Knott (2010) suggested there was a continuum in conceptualizing the insider, that is, an emic perspective, and the outsider, that is, an etic perspective, in researching religious groups which I believed was appropriate and adaptable to this study. It was critical to appreciate the potentially complex issues of subjectivity and objectivity, emic and etic perspectives, and the potential implications for this study (Knott, 2010, p. 271). On the continuum of the insider/outsider dichotomy in this study, I was both an insider and an outsider which to a degree intersected and overlapped.

As a lifelong member of the Roman Catholic faith community, I had an emic perspective in the sense I was familiar with Catholicism's core doctrines and practices. My emic perspective was also shaped by my husband, also a lifelong Roman Catholic, who was an immigrant to Canada from Mexico. My husband's insights and experience of Catholicism in Canada, compared to those of his home country, along with those of other immigrants from Africa, Asia and Latin America with whom I am acquainted, made me aware of the richness but also the challenges this cultural diversity brings to the Canadian Catholic Church with respect to parish life and adult religious education in increasingly multicultural parishes and civic communities.

With respect to adult religious education, I was not a professional religious educator. Therefore I considered myself an outsider to the organizational structures and bureaucracy of the Church vis-à-vis the experiences and perspectives of those persons professionally engaged in adult religious education practice and leadership in various capacities and venues in the Canadian Catholic context. Thus, I also had an etic perspective. However, with this being said, in my Master of Education (Educational Administration) and Doctor of Philosophy (Educational Administration) programs, in regarding the Church an educational organization, I focused on adult religious education, particularly in the parish milieu. I gained insights from the body of theory about educational administration and leadership with respect to communicating and teaching the Catholic faith.

All the major papers I wrote in my Master of Education and doctoral courses were on topics related to adult religious education and leadership based on themes from the discipline of educational administration and leadership. These included community development and capacity building, educational leadership development, educational policy making and implementation, ethical decision-making and leadership, freedom of conscience and religion

rights, and organizational change and renewal. Along with becoming conversant in the field of educational administration and leadership, given my focus on adult religious education and leadership in the Catholic context, especially in the parish milieu, writing the papers required in-depth reading and engagement with Catholic Church history and official Catholic documents relevant to adult religious education from both a historical and contemporary perspective. Based on this scholarly work, three peer-reviewed papers were published (Otero, 2016; Otero & Burgess, 2011; Otero & Cottrell, 2013). My etic perspective and academic background may have provided some detachment which allowed me to see things that those who were insiders did not see.

### **Collaboration and Collaborative Leadership in the Church**

My principal understanding of what it meant to be a member of Church has three elements and implications for how I believe educational leadership in the Church should be exercised. First, the Second Vatican Council explicitly acknowledged, through the sacrament of baptism, all members of the Catholic faith community, clergy and lay persons alike, foundationally shared a common identity and equality and were co-responsible for the Church's mission (CC, 1997, para. 27; CCCB, 2016b; Second Vatican Council, 1964, paras. 30–42). Second, my personal understanding of what it meant to be a Roman Catholic was rooted in the New Testament meaning of discipleship which was expressed throughout the GDC (CC, 1997). Third, my foundational understanding of the Church, in whatever institutional form it was expressed, it was a *community of disciples* (CC, 1997, paras. 43, 53, 70, 102, 103; John Paul II, 1979a, para. 21; Vallabharaj, 2008, pp. 143–148). Dulles (1983) stated, “Discipleship is the common factor uniting all Christians with one another, for no one of them is anything but a follower and a learner in relation to Jesus Christ” (p. 12). In this understanding of the Church, all members of the Church, both clergy and lay, shared the status of disciple.

Regarding leadership in the Church, to avoid the distinction between clergy and lay persons, Dulles (1983) emphasized, “As disciples, all must help, using their talents for the benefit of the rest. . . . The concept of discipleship undercuts the illusion that some in the Church are lords and masters” (p. 12). Clergy and lay persons were co-responsible for the Church's educational mission with respect to communicating and teaching the Christian faith (CC, 1997, para. 43). There were different leadership roles in the parish milieu, both formal and informal. Lay persons can collaborate in the teaching function of parishes, not only as religious educators

but also in educational leadership roles (CC, 1997, paras. 231–232). Relatedly, even though I certainly appreciated the value of higher education credentials in religious education and Catholic theology, I believe Catholic adults of deep faith and commitment can engage in various dimensions of adult religious education work in the parish without having a higher education credential. Rather, what is important is they have the appropriate training for their particular context and role. There are different types of knowledge and wisdom among adults which were not necessarily based on formal education.

### **Women in Educational Leadership Roles**

*Evangelii Gaudium* stated there was a “need to create still broader opportunities for a more incisive female presence in the Church” (Francis, 2013, para. 103). How to open new opportunities for women in the life of the Church and how to include women in higher positions and decision-making authority within Church structures are subjects of current and ongoing dialogue within the Church (Glatz, 2015, p. 3; Swan, 2015, p. 5). Even among Catholics, including Catholic women, there are different but sincerely and strongly held views about women’s roles (Swan, 2015, p. 5). However, women historically made and continue to make significant contributions to the life and mission of the Church including exercising leadership in different roles and ways, especially in the years following the Second Vatican Council (Westenberg, 2016, p. 32).

Given the particular sociocultural context of my generation when I was in early adulthood, there was a great expansion of roles and opportunities for women in western society. Being a highly educated woman in western society who had professionally worked and studied in secular academia with its social and professional norms for almost four decades, I wrestled with a number of complex issues regarding roles of women in the life of the Church. However, upon extensive study and careful reflection about many matters regarding women and the Church, both historically and contemporarily, I made an informed personal choice to be committed to the Catholic faith and remain within the Church.

Whatever the questions and ongoing dialogue regarding the roles of women in the life of Church, even in the secular first world, despite the educational, professional, and social advancement of women over the past few decades, secular media reports often decried how far women still had to go to achieve gender parity in many areas of economic, political, and social life. Even in secular academia in the first world, an article in Canada’s major national newspaper

reported “the lack of female leaders at Canadian universities is an urgent problem that needs to be addressed by every institution” (Chiose, 2016).

The Church, as an organization, cannot afford not to avail itself of women’s creativity and capacities in adult religious education work including their abilities to assume meaningful educational leadership roles in the parish, or within the wider Church. Along with recognizing and empowering women to use their gifts more fully in the Church (Novecosky, 2016, p. 14), the Church may also need to develop new paradigms to foster authentic and meaningful shared leadership and recognize that the function of women was not an ancillary or derivative one nor was tokenism acceptable.

### **Organization of the Dissertation**

Chapter One presented an introduction to the context of this study and my personal background with respect to my interest in the topic of my study and the significance of this study. An overview of the background to the problem was then provided, followed by the study’s purpose and research questions. Chapter One also briefly described the study and outlined its delimitations, limitations, assumptions, and key definitions. An explanation of my positionality with respect to the study concluded Chapter One.

Chapter Two reviewed literature to (a) ascertain the current state of research in the area of adult religious education, and (b) demonstrate the need for historical and empirical research in the field of parish-based adult religious education in the Canadian Catholic context. Chapter Two also reviewed selected literature about CoPs relevant to the training and development of adult religious educators and leaders for Canadian Catholic parishes.

Chapter Three described the research methodology and design. An overview of the constructivist paradigm, the interface between the constructivist paradigm and the Catholic worldview, the constructivist paradigm and historical inquiry in religious education was followed by a review of educational historiography, case study research, and memoing. Regarding research methods, the sources of data, data collection and analysis, criteria and strategies to establish the trustworthiness of the study, and ethical considerations were then outlined.

Chapter Four presented the integrated documentary and interview data organized into the major themes which emerged from data analysis in relation to research questions one and two.

Chapter Five discussed the findings and conclusions related to research questions one and two and addressed research question three. This was followed by the discussion and conclusions

regarding related challenges and issues and educational historiography. Implications for theory, policy, practice, and further research were then discussed. A personal reflection on the dissertation journey concluded Chapter Five.



## CHAPTER TWO

### LITERATURE REVIEW

Salient to the purpose of this study, two distinct bodies of literature were reviewed. The first body of literature pertained to parish-based adult religious education from 1983 to the present. The second body of literature was related to CoPs.

First, the literature review regarding religious education involved searching specifically for empirical and historical studies regarding the religious education of adults with a focus on the Catholic parish, not only in Canada but in English-speaking countries such as Australia, Ireland, the United Kingdom, and the United States. The purpose was to position this study within the literature, and relatedly, to demonstrate the need for historiographical and empirical studies in the Canadian Catholic context.

Using keywords and phrases such as adult religious education, catechesis, Catholic, historical/historiography, non-informal adult education, informal adult education, parish, qualitative, both individually or in combination, the following search engines were employed to locate appropriate literature for this study:

- Catholic Periodical and Literature Index (a bibliographic database compiled by the American Theological Library Association and the Catholic Library Association),
- Educational Resources Information Center (ERIC), and
- Google™ Scholar.

Also, the volumes and issues of key academic journals, listed below, relevant to adult religious education, 1983 to present, were individually reviewed:

- *International Studies in Catholic Education*,
- *International Journal of Practical Theology*,
- *Journal of Adult Theological Education*,
- *Journal of Religious Education (Australia)*,
- *Practical Theology*,
- *Religious Education*, and
- *Review of Religious Research*.

Academic journals in the field of secular adult education and Catholic Church history were also reviewed. Pertinent to establishing the need for scholarly research in adult religious education in the Canadian Catholic context, this section of the literature review also drew on the

CCCB's third major publication about adult religious, *On Good Soil* (CCCB, 2011) and Kuzmochka's (2014) Doctor of Ministry thesis.

Second, the purpose of reviewing selected literature about CoPs was to address research questions two and three which are repeated below:

2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

A Google™ Scholar search of the exact phrase “community of practice” or “communities of practice” anywhere in literary works since 1991, when the first two seminal works about CoPs were published returned staggering tens of thousands of results in diverse fields and demonstrated CoPs were created for many different purposes. The results of these Google™ Scholar searches included scholarly literature, books, chapters in books, and commissioned reports. Although there was extensive literature about CoPs, refined literature searches uncovered very little literature about CoPs related to adult religious education in any Catholic or non-Catholic faith community. Partially based on synthesis literature reviews about CoPs (Koliba & Gajda, 2009; Li et al., 2009b; Murillo, 2011; Squires & Van De Vanter, 2013), literature was selected to provide an overview of the CoP framework and its theoretical assumptions. Also, literature was chosen which was considered relevant to the training and development of adult religious educators and leaders for Canadian Catholic parishes.

The two distinct bodies of literature reviewed are depicted below (see Figure 2.1).

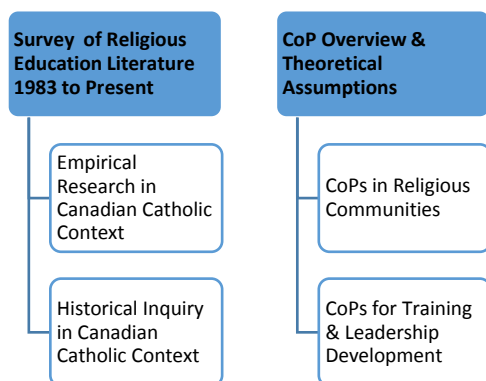


Figure 2.1. Literature map. Inspired by Creswell (2016).

### **State of Empirical and Historical Research in Religious Education**

The review of the first body of literature ascertained the general state of empirical and historical research relevant to adult religious education in the parish context from 1983 to the present. The survey of the literature confirmed there was indeed a paucity of knowledge about many topics pertinent to adult religious education, including topics relevant to adult religious education leadership, in the conventional scholarly literature, confirming the need for additional research. Grace (2009) expressed the need for more systematic study of and research in Catholic education in all its forms, including parish-based adult religious education (pp. 8, 12). Grace (2009) emphasized:

The work of Catholic education is crucial to the renewal of the faith and of the Church itself. We need to know more about its present mission integrity and education and spiritual effectiveness in challenging circumstances. To do this we need more research, evaluation and serious scholarship and more international communication among Catholic educators of various backgrounds, cultures and disciplines. (p. 12)

Elias (2012) also highlighted the importance of research in adult religious education:

The fact remains that religious institutions, organizations, and groups, with all their limitations and faults, remain the principal source for nurturing the spiritual or religious impulse or spirit in individuals and societies. . . . Thus, the work of adult religious education performed in these organizations needs and deserves the attention of scholars in education and other academic disciplines. (p. 6)

Despite Grace's (2009) and Elias' (2012) recognition of the need for research in religious education, numerous scholars in the field of religious education commented on the dearth of quantitative and qualitative research in religious education in the principal religious education journals. These scholars expressed a need for high quality empirical research in many different areas related to religious education, including educational leadership and history of religious education (Barnes, 2005; Cohen, 2006; English, 2002; English, 2005a; English, 2006; English, D'Souza, & Chartrand, 2005a; English, D'Souza, & Chartrand, 2005b; Freathy & Parker, 2010; Jarvis, 2005; Lawson, 2006; Litchfield, 2006; Schweitzer, 2006; Seymour, 2005). English, MacDonald, and Connelly (2006) pointed out, "By and large, ARE [adult religious education] is neglected, and that dimension of it that deals specifically with lay education is especially neglected" (p. 131). They also noted the absence of "strong educational research studies with

systematic data collection. . . . that are in accessible refereed formats” (English et al., 2006, p. 132). English et al.’s (2005b) 10-year review of research patterns in religious education in North America and the United Kingdom in the two principal religious education academic journals indicated low rates of field research, especially qualitative research, and suggested the lack of original research may diminish the quality of the journals (pp. 205–206, 208–209).

A possible explanation for the dearth of empirical research in the field of religious education is that the identity and status of religious education as an academic discipline in its own right is ambiguous and not well established. Even though religious education developed as an academic discipline in Catholic colleges and universities, generally speaking, its academic home was ambiguous. Several scholars indicated religious education’s unclear relationship to academic theology and to the disciplines of education resulted in religious education being viewed on the margins of theology and education (D’Souza, 2001, p. 2; Elias, 1986, pp. 17–23; Schweitzer, 2006, p. 166). D’Souza (2001) stated the theological academy deemed religious education “a soft discipline, lacking intellectual challenge and occupying a quiet place on the sidelines of critical theological debate” (p. 2). In addition, Schweitzer (2006) remarked educational philosophers “consider religion as something metaphysical or mystical that cannot be taken up in research” (p. 166).

The identity of religious education as an independent academic discipline was even more ambiguous because it was also considered a sub-discipline of practical theology. Practical theology is a branch of Christian theology which examines issues related to the lived experience of Christian faith in its many dimensions and the practice of various church ministries, including religious education. Miller-McLemore (2012a) described the evolution of practical theology as an academic discipline, both intellectually and institutionally, over the past several decades in a variety of Christian denominations. Practical theology, itself, as an academic discipline, was multivalent given its various sub-disciplines, different contexts, and multiple methodologies and methods for studying theology in practice as the chapters in *The Wiley-Blackwell Companion to Practical Theology* (Miller-McLemore, 2012b) demonstrated. However, O’Gorman (2015) pointed out practical theological struggled to find a place in the wider theological academy (p. 489).

Bridgers (2012) gave an overview of the diversity and breadth of the development of practical theology within Roman Catholicism in various areas including religious education.

Within Roman Catholicism, the methods, purposes, definitions and subject matter of practical theology varied widely as did the contexts in which practical theologians carried out their work (Bridgers, 2012, p. 575). Despite these developments, Bridgers (2012) remarked, “The recognition of Catholic practical theology as a fully formed discipline may not yet have emerged, but growing recognition of the need for attention to practice and of training for competence in ministry continues to grow” (p. 575). Whatever the ongoing discussions regarding the status of practical theology as an academic discipline, especially in the Catholic context, what was salient to this study was to recognize the continuing ambiguity of religious education as an academic discipline.

O’Gorman (2015) indicated the current status of religious education, as an academic discipline in North America, was fragile with respect to its academic identity, the question of its relevance to faith communities, its capacity to address issues of faith in public life and the global community, and concerns about its future prospects as a discipline.

### **Empirical Research in Religious Education in the Canadian Catholic Context**

Mulligan (2006) commented on the dearth of research about the local or national Catholic education experience in Canada and suggested Canada was “the poorer for it” (p. 28). With some exceptions (Donlevy, 2002; Donlevy, 2007; McDonough, 2009; McDonough, 2012; McDonough, 2015a; McDonough, 2015b; McDonough, 2016a; McDonough, 2016b), nine years later, Rymarz (2015) indicated “the absence of a strong scholarly community of reference for those interested in RE [religious education] in Canadian Catholic schools”, and correspondingly, “the paucity of published academic literature on RE [religious education] in Canadian Catholic schools” resulting in the Canadian perspective not being fully realized (pp. 263–264). Similarly, the absence of a strong academic community and infrastructure in the area of adult religious education in the Canadian Catholic context served as a barrier to the Canadian perspective being realized and to Canada developing its own voice in this field.

Elias (1989) analyzed Roman Catholic documents pertaining to adult religious education published in Australia, Canada, England and Wales, and the United States. With respect to analyzing *Adult Faith, Adult Church* (CCCB, 1986), Elias (1989) acknowledged several strengths but critiqued it for its lack of Canadian content noting *Adult Faith, Adult Church* (CCCB, 1986) drew extensively on scholarly work by American theologians, social scientists, and educators. Elias (1989) commented:

The Canadian adult educators prefer to speak to a large extent through the words of United States scholars. At times, I wished for a more Canadian voice and fewer extensive quotations from scholars in the field. A major strength of the document, however, is the quotations from Canadian Catholics, which were gathered by a national survey on adult religious education. The document does not appear, however, to be clearly situated within the Canadian cultural context, although sporadic references are made to elements in Canadian culture. . . . On first reading, the Canadian document is the least impressive of the position papers because of its heavy emphasis on secondary sources. But a careful reading of the paper reveals a serious attempt to bring relevant theory and research into practice. (pp. 97–99)

An exhaustive literature search revealed there was very little conventional scholarly literature in the area of adult religious education in the Canadian Catholic context. The literature search uncovered four published empirical studies on topics regarding adult religious education in the Canadian Catholic context in the past three decades, all of them authored and coauthored by the same person (English, 1999a; English, 1999b; English, 2002; English et al., 2006).

Two of these studies addressed topics directly related to adult religious education in the parish milieu in four Canadian rural parishes (English, 1999a; English, 1999b). English's (1999a) study focused on lay female pastoral leaders in parishes without a resident priest-pastor with respect to their informal teaching strategies in the parish milieu. These strategies included modeling, coaching, networking, and continuous dialogue. All six of the female pastoral leaders were religious sisters, had Master's degrees, and had been professional educators prior to engaging in parish pastoral work. English's (1999b) study investigated parishioners' informal and incidental learning due to significant shifts in parish leadership from male clerics to lay female leaders, all of whom were religious sisters.

Kuzmochka's (2014) thesis, a mixed methods case study of an adult religious education series carried out in a Canadian archdiocese, in partial fulfillment for the Doctor of Ministry degree at Saint Paul University, Ottawa, ON contributed to Canadian based empirical research in the field of adult religious education. In particular, Kuzmochka's (2014) Canadian based research findings indicated there was a desire for adult religious education at the parish level, and moreover, there was a need to train and develop adult religious educators to engage in and lead adult religious education in parishes (pp. 160, 224, 229, 231–232). Kuzmochka (2014) also

recognized there was a great disconnect between the vision of the GDC (CC, 1997) and the practice of adult religious education.

It should be noted the literature search uncovered only three other empirical studies regarding adult religious education in Catholic parishes in North America. Two of these studies were based in the United States (Fleischer, 2006; Yamane, 2012). Forrow and Rymarz's (2016) indicated their study was conducted in one large North American diocese (p. 339). Based on Senge's (2006) five disciplines of learning organizations, Fleischer's (2006) qualitative content analysis study researched parish leaders' learning through ministry activities in one parish. Yamane's (2012) quasi-experimental study investigated aspects of the Rite of Christian Initiation of Adults (RCIA) process in 32 American parishes. The RCIA is the parish-based process for initiating adults into the Catholic faith and the Church. Forrow and Rymarz's (2016) study reported "on a comprehensive review of RCIA" which concentrated "on gathering a better understanding of how RCIA operates on a parish level across one large and diverse archdiocese" (p. 339). Forrow and Rymarz's (2016) findings revealed "a majority of parishes report problems with attracting and training catechists" (p. 340). Regarding the training and development of adult religious educators, Forrow and Rymarz (2016) reported:

Development of catechists is also a major concern. . . . There is a need for more training for catechists. It is difficult to persuade people to become catechists if they do not have an idea of what is required of them. (p. 340)

It would be interesting to know if Forrow and Rymarz's (2016) study was conducted in a Canadian archdiocese because these findings align with the human resources challenges identified over the past 30 years in the Canadian Catholic context, and more recently in *On Good Soil* (CCCB, 2011).

The CCCB issued *On Good Soil: Pastoral Planning for Evangelization and Catechesis with Adults*, its third major publication about adult religious education in the Canadian context, in 2011 (CCCB, 2011). With respect to research in adult religious education, *On Good Soil* (CCCB, 2011) stated:

During the last number of years in Canada, and in other countries . . . various studies have been conducted and documents have been prepared on the subject of adult faith development. . . . In light of the vast amount of recent work in this area . . . . It draws upon the work of many researchers and authors. (p. 14 (sec. 2, 4))

However, *On Good Soil* (CCCB, 2011) was unclear regarding the studies referred to nor did it demonstrate any evidence of a verifiable body of research. A reply by the then Director of NORE to an inquiry regarding the research referred to in *On Good Soil* (CCCB, 2011) indicated it did not have a bibliography. Rather, ideas were collected from online documents available on the websites of Bishops' Conferences in other countries and consultations across Canada (J. Chafe, personal communications, October 29 & November 1, 2011). Kuzmochka (2014), a member of the resource development team for *On Good Soil* (CCCB, 2011), commented:

It is important to note that the document [*On Good Soil* (CCCB, 2011)] is based neither on any systematic research into what is actually happening in adult catechesis in Canada, nor on any qualitative study of what is working or not working to empower adults in faith. If there are serious obstacles to effective adult catechesis in Canada, it is important to ask if building a solid base of empirical research might help to address the problem. (p. 10)

Given the paucity of empirical research over the past three decades in the Canadian Catholic context about topics relevant to parish-based adult religious education, there was a huge gap in the conventional scholarly literature. This situation demonstrated the need for foundational scholarly work, both historical and empirical, on a myriad of topics relevant to parish-based adult religious education in the Canadian Catholic context.

### **Historical Inquiry in Religious Education in the Canadian Catholic Context**

Given the importance of the Church's teaching function, the Church, represented in the parish at the local level, can be studied as an educational setting. Therefore it can be a locus of historical writing and study (Henry, 2006, p. 335). Several scholars emphasized the need for historical inquiry in religious education. Schmidt (1985) highlighted a historical perspective "may serve in the renewal of religious education" (p. 372). Applicable to historical inquiry in religious education, Johnson and Christensen (2014) said studying the past can identify educational strategies which have worked and may be useful for contemporary concerns (p. 469).

Regarding historical inquiry in religious education, Freathy and Parker (2010) stated there was "a paucity of rigorous historical inquiry in religious education research" (p. 229), and a survey of research in the two principal religious education journals revealed "a neglect of the utilisation of historical methods and lack of historical consciousness" (p. 232). Freathy and Parker (2010) argued historical inquiry in religious education was legitimate and relevant



because this type of research may shed light on the historical context for past religious education policy and practice and help understand the current situation (pp. 233–235).

Lawson (2006) recognized that more historical inquiry in various areas of religious education was necessary but stated, “It was not enough to know what was done in the past” (p. 159). Lawson (2006) was convinced historical inquiry in religious education “would help us to question the assumptions of the present and to consider alternative approaches that may offer rich rewards” (p. 159). Historical inquiry in religious education may provide insights into what made the work of religious education fruitful in its time and place, and what insights may be gained for religious education work today (Lawson, 2006, p. 159).

Although there is a lacuna of empirical research in parish-based adult religious education in the Canadian Catholic context, and many topics in need of inquiry, it is the premise of this dissertation that a thorough historical understanding of different aspects of adult religious education work in the Canadian Catholic context is necessary to fully understand how the present situation has evolved. Documenting this historical trajectory will also provide a foundational body of data and interpretation to enable future empirical studies, to animate a more robust body of academic scholarship and, ultimately, to generate scholarly insights that may be applied to improve current practice in the field of adult religious education.

### **Communities of Practice**

Along with exploring historical approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes undertaken during the 1983 to 2011 period, this study was also focused on investigating if any of these approaches exhibited the structures and features of a CoP. An additional consideration was how a CoP approach may best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes.

This section of the literature review begins with an overview of the CoP framework and the theoretical assumptions underlying it, which is followed by a survey of the literature regarding CoPs in religious communities. Then, a historical survey of what could be considered precursors of CoPs in the Church is followed by a review of examples of CoPs as an alternative approach for church ministry training and employee training, and the existence of CoPs within a larger organization. Literature about mentorship and peer learning and support within a CoP is

then reviewed.

### **The Community of Practice Framework and Its Theoretical Assumptions**

From an anthropological viewpoint, the CoP framework was not new or novel because “humans have lived in groups for centuries, and it is in these communities that the education of the next generation was provided by the elders” (Squires & Van De Vanter, 2013, p. 290). Sharing and learning in practice-based communities existed throughout history in different forms and contexts with the experienced members imparting knowledge to and instructing the new members as they developed proficiency. Historical forms of CoPs included classical Greek and ancient Roman “corporations” of different types of craftsmen and the European craft guilds of the Middle Ages (Wenger, McDermott, & Snyder, 2002, p. 5). Essentially, a CoP was a social structure through which knowledge was created, shared, and applied, and learning occurred through participation.

Hoadley (2012) pointed out although the term *community of practice* was used by Brown and Duguid (1991), the introduction of the term usually was attributed to Lave and Wenger (1991) (p. 286). Based on five ethnographic studies of traditional apprenticeship models of teaching and learning, Lave and Wenger (1991) explored learning as a situated activity and the process by which newcomers became part of a CoP (p. 29). In these apprenticeship relationships, the new members were acknowledged as legitimate, but peripheral, members of the community. Lave and Wenger (1991) designated the progression from peripheral membership to becoming a full-fledged member of the community and constructing one’s identity in relation to their particular CoP as “legitimate peripheral participation” (p. 29). Learning was viewed as the process of joining the community, working alongside the experienced members of the community, beginning with the basics and eventually mastering more complicated tasks through acquiring the knowledge and practicing the skills to develop their competency in the practice. Lave and Wenger (1991) described this process of learning as “situated learning”, that is, continuous active informal learning by engaging in the community’s practice through social interactions with the established members of the community in a specific context or location, rather than formal instruction or training (pp. 32–34).

Based on Lave and Wenger’s (1991) work, Hoadley (2012) suggested a CoP could be defined based on its features (p. 286). A feature-based definition of a CoP highlighted that learning was situated, contextual, and relational as the CoP shared practices (Hoadley, 2012,

p. 287). Hoadley's (2012) feature-based definition "highlights the importance of learning being situated in authentic practice contexts or practice fields" (p. 289). At the heart of a CoP was social learning theory. Vallabaraj (2008) explained the CoP framework was founded on social learning theory which emphasized learning as a social process, that is, learning occurred in relationship with others when persons gathered together for a common purpose (p. 131).

Comparative reviews of the four seminal works about CoPs, published between 1991 and 2002 (Brown & Duguid, 1991; Lave & Wenger, 1991; Wenger, 1998; Wenger et al., 2002), done by Cox (2005), Kimble (2006), Li et al. (2009a), and Murillo (2011) showed that although these works shared important common ground there were also divergences. However, Koliba and Gajda (2009) argued Wenger (1998) had done the most to advance CoP theory (p. 101). Using situated learning as the basic building block, Li et al. (2009a) stated Wenger (1998) substantially expanded and refined the CoP framework through borrowing "theoretical aspects from education, sociology, and social theory . . . with a focus on socialization and learning, and the individual's identity development" (p. 4).

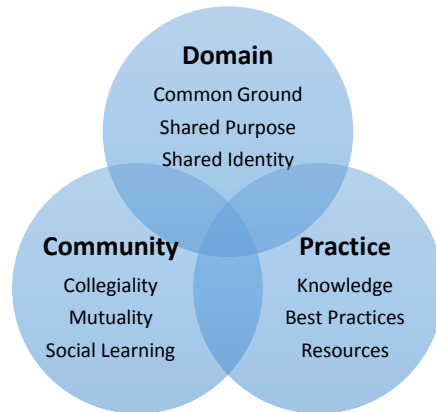
Wenger (1998) proposed three interrelated dimensions, *joint enterprise*, *mutual engagement*, and *shared repertoire* were what constituted a CoP. Joint enterprise was the members' common understanding of the CoP's purpose which was collectively negotiated, resulting in shared commitment to and identification with the purpose for which they were held mutually accountable (Koliba & Gajda, 2009, p. 102; Murillo, 2011, pp. 8–9; Squires & Van De Vanter, 2013, p. 291; Vallabaraj, 2008, pp. 133–134; Wenger, 1998, pp. 77–82). Mutual engagement referred to the nature and quality of the members' interpersonal relationships and interactions, that is, how the CoP functioned (Koliba & Gajda, 2009, p. 102; Murillo, 2011, pp. 8–9; Squires & Van De Vanter, 2013, p. 291; Vallabaraj, 2008, p. 133; Wenger, 1998, pp. 73–77). Wenger (1998) emphasized a CoP was "not just an aggregate of people defined by some characteristic" (p. 74). Essentially, mutual engagement in a CoP was characterized by building and maintaining social capital and developing shared meaning that bound the members together. The shared repertoire was the set of common resources and the capability which members developed over time which allowed them to engage more effectively (Koliba & Gajda, 2009, p. 103; Murillo, 2011, pp. 8–9; Squires & Van De Vanter, 2013, p. 291; Vallabaraj, 2008, p. 134; Wenger, 1998, pp. 82–84).

In the last seminal work about CoPs to date, Murillo (2011) suggested Wenger et al.

(2002) provided “a practical guide for organizations wishing to launch and nurture communities of practice” (p. 10). Wenger et al. (2002) popularized and simplified the CoP framework defining CoPs as “groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis” (p. 4). Parallel to joint enterprise, mutual engagement and shared repertoire, the structural elements which now constituted a CoP were domain, community, and practice (Li et al., 2009a, p. 6; Murillo, 2011, p. 10; Wenger et al., 2002, p. 27). This definition and understanding of the structural elements of a CoP appeared to be the most widely used in recent literature about CoPs.

The domain created the common ground, that is, the area of knowledge or activity which brought people together over time, and defined the CoP’s identity (Wenger et al., 2002, pp. 31–32). A CoP can be formed around a common need, concern, interest, or passion. Membership in the CoP implied a commitment to the domain and inspired members to contribute, participate, and engage in the process of collective and collaborative learning through sharing knowledge and experiences (Wenger et al., 2002, p. 30).

The structural element of community was critical to a CoP’s ability to share knowledge and experience because “the community creates the social fabric of learning” (Wenger et al., 2002, p. 28). As the CoP pursued its interest in its domain, the community itself was the social learning environment; thus the community element was what fostered building relationships, interactions, and learning together, thereby developing a sense of belonging and mutual commitment (Wenger et. al, 2002, pp. 28, 34). A CoP was a highly relational space which nurtured and strengthened identity and reciprocity. For a CoP to work, individuals needed to have a high degree of social capital which was the capacity to build quality relationships, based on trust and the willingness to cooperate and work together for the common good based on shared beliefs and values (Zadeh, Ahmad, Abdullah, & Abdullah, 2010, pp. 111–112). The practice was the variety of knowledge and resources the CoP shared, developed and maintained that enabled it to deal with its domain (Wenger et al., 2002, pp. 29, 38–39). The three structural elements of a CoP, each with its core characteristics listed, is depicted below (see Figure 2.2).



*Figure 2.2.* The three structural elements of a CoP.

Even though it was argued Wenger (1998) expanded the CoP framework theoretically, Murillo (2011) observed Wenger (1998) did not follow up with empirical studies which would have contributed to a more focused and nuanced understanding of the CoP framework (Murillo, 2011, pp. 9–10). Loyarte and Rivera (2007) also pointed out:

Although much has been written about CoPs, how they are formed, how they work and what they are good for, formal research on CoPs and their impact on organizations has been limited both in the way of finding results and in the research method used. (p. 68)

Li et al.'s (2009b) review of CoP literature in the business and health care sectors identified several areas for future research to improve the usefulness of the CoP framework (p. 7). Koliba and Gajda (2009) reported there were repeated calls for more empirical research about many different aspects of CoPs such as the specific conditions that may foster or hinder the development of a CoP or ascertaining their impact on organizations (pp. 103–104, 111–120).

The ambiguity of a definition of a CoP led to the framework being pragmatically interpreted and adapted in many different ways to use in diverse contexts to achieve different purposes (Cox, 2005, pp. 527–528; Koliba & Gajda, 2009, pp. 97–101; Murillo, 2011, pp. 3, 12). Murillo (2011) remarked a simplified understanding of the CoP framework “contributed to the proliferation of studies built on shallow theoretical foundations and blurred the differences between CoPs and other social phenomena concerned with knowledge and learning” (p. 10).

It was important to note CoP theorists explained how a CoP differed from other workplace structures such as formal departments, operational and project teams, communities of

interest and informal networks with respect to their purposes, who belongs, what holds the group together, and how long the group may last (Wenger and Snyder, 2000, pp. 141–142; Wenger et al., 2002, pp. 41–44). Also, it was important to appreciate similar organizational social structures such as occupational communities, occupational subcultures, networks of practice (Murillo, 2011, pp. 10–11), professional learning communities (Mullen & Schunk, 2010; Stoll, 2011), learning organization (Canada Public Service Agency, 2007; Senge, 2006), and learning communities (Kilpatrick, Barrett, & Jones, 2003), which all reflected a shared concern with knowledge and collective and collaborative learning but had nuanced differences in how they conceptualized and emphasized different aspects of how collaborative learning takes place. However, with this being said, the notion of a CoP remained popular in many fields. In comparison with other social aggregations what differentiated a CoP was that its structural elements were more clearly defined because of its emphasis on a clearly defined or negotiated common purpose, a sense of community and mutuality, and the development and sharing of resources to enhance practice, which fostered a CoP having an overall sense of coherence.

From its beginning in apprenticeship studies, the original concept of a CoP broadened and was operationalized in the business, education, health, government and knowledge management sectors, professional groups, and other sectors attesting to the appeal of its core ideas for creating, sharing, and learning together, and applying knowledge (Bedford, 2012, p. 29; Koliba & Gajda, 2009, pp. 99–100; Wenger-Trayner & Wenger-Trayner, 2015, pp. 4–6). Koliba and Gajda (2009) highlighted “the term [CoP] is being employed across a broad spectrum of disciplines and professions to describe and signify groups of people working to achieve common goals and objectives” (p. 118).

Educational researchers and practitioners demonstrated great interest in the CoP concept. CoPs were implemented for various purposes in many different areas of education and at all levels from early childhood education to higher education, and also non-formal and informal adult education and learning beyond formal educational organizations (Hildreth & Kimble, 2008, pp. ix–xiii; Kimble, Hildreth, & Bourdon, 2008a; Kimble, Hildreth, & Bourdon, 2008b; Koliba & Gajda, 2009, p. 99).

### **Communities of Practice in Religious Communities**

Adapted from Wenger et al. (2002), a proposed generic working definition of a CoP regarding adult religious education policy and practice in the Church would be a group of

persons who have an interest in and passion for adult religious education (domain), who gather regularly to interact and learn together in an atmosphere of mutual trust and respect (community), to create, share, and steward the practice in its unique local context (pp. 27–29). In other words, “the domain denotes the topic the community focuses on, the practice is the specific knowledge the community develops, shares, and maintains” (Wenger et al., 2002, p. 29). Salient to this study, the specific purpose of this literature review of selected literature about CoPs was to focus on how the CoP framework could be applied to train and develop adult religious educators and leaders for Canadian Catholic parishes.

Even though there was extensive and diverse literature about CoPs, there was limited literature related to applying the CoP framework in faith communities or religious education in the conventional scholarly literature. Relatively recent literature explored aspects of the CoP framework for church ministry training (Jolley & Jones, 2016; Otero & Cottrell, 2013; Porterfield & Isaac-Savage, 2013), peer-to-peer learning and support for persons engaged in church ministry (Barker, 2014; Muskett, 2016), and undergraduate teaching in the area of biblical studies (Madrigal, 2012).

Bedford (2012) stated, “We tend to think of religious communities as structured or institutional communities because of their doctrinal knowledge base and established religious and spiritual practices” (p. 32). Even though CoPs developed in many sectors and the tendency was to focus on CoPs that existed in the work environment rather than social or spiritual environments, Bedford (2012) pointed out religious communities were one of the most common but overlooked forms of CoPs. Bedford (2012) observed religious communities “are anchored in many types of knowledge: doctrinal knowledge and scriptures, ritual knowledge and rites, individual spiritual beliefs, and religious teachings and religious community practice” (p. 32).

Based on the definitions of the three structural elements of a CoP, domain, community, and practice as relevant to religious communities, Bedford (2012) argued religious communities exhibited characteristics of CoPs and could be characterized as CoPs (pp. 33–36). Also, Bedford (2012) noted, “Religious communities are complex entities with multiple levels of practice” (p. 32). The practice of religious communities can be viewed at the denominational level, the diocesan level, the parish or church level, and the individual member level (Bedford, 2012, pp. 32, 38–39). Consequently, Bedford (2012) argued there can be many “communities” associated with various aspects of religious knowledge, and “church activities and ministries

most closely resemble communities of practice” (p. 36). Salient to this study, one form of religious knowledge and practice was the Church’s teaching ministry which implicitly included training and developing adult religious educators and leaders for religious communities such as parishes.

Bedford’s (2012) observations were limited to a few case studies, only two of which were referenced (p. 33). Bedford (2012) commented churches that “behave like and adopt community of practice cultivation methods, those churches will survive and thrive” (p. 33). Bedford (2012) referred to exploratory case studies of two American Christian religious communities, one Roman Catholic parish and one Baptist congregation, which drew upon the CoP framework to develop vibrant and thriving religious communities. Bedford (2012) implied applying the CoP framework especially benefitted religious communities at the individual parish or church level because it enabled the individual parish or church to take responsibility for the development of their religious community in their unique context and circumstances.

### **The Community of Practice Framework in the Catholic Context**

Five publications conceptually explored applying the CoP framework in areas related to adult religious education in the Catholic context. Two of these were peer-reviewed publications (Otero & Cottrell, 2013; Shields, 2009). The three other publications were books authored by distinguished Catholic academic theologians and specialists in religious education (Regan, 2014, 2016; Vallabharaj, 2008).

Based on Wenger’s (1998) three structural elements of a CoP, joint enterprise, mutual engagement, and shared repertoire, Regan (2014, 2016) conceptually examined how parish leaders and members of the typical and various groups, committees, or sub-communities within a parish may function as a CoP and intentionally foster adult religious education and learning through the parish’s activities. In effect, if considered CoPs within the parish, these multiple CoPs created a constellation of CoPs through which the multifaceted work of the parish was done and at the same time fostered adult religious education and learning in a wide range of ways (Regan, 2014, 2016). Shields (2009) and Vallabharaj (2008) theoretically explored cultivating CoPs as small faith groups which created a venue and opportunity for adult religious education. Shields (2009) also implicitly suggested leaders may emerge from these small groups as people developed a sense of co-responsibility for the Church’s mission (pp. 356–357). Even within the Church’s official hierarchical structures, Shields (2009) stated:



Catholics can engage in a catechesis, without handing over all responsibility for the Church to its officeholders and hierarchical institutions or ignoring the authentic authority of the tradition of faith and the universal community of believers that the pope and bishops uphold. (p. 357)

Otero and Cottrell (2013) presented a preliminary conceptual exploration of the CoP framework as one potential approach to train and develop adult religious educators and leaders for Catholic faith communities, especially parishes, in the Canadian Catholic context. Otero and Cottrell's (2013) preliminary exploration suggested:

The Church could derive significant benefit from insights from communities of practice (CoPs) theory. These may be leveraged to educate and form promising adult catechists, thereby concretizing what the Church envisions for adult faith formation in community. The CoP framework may provide vital support and learning for newcomers to the field of adult religious education and educational leadership in Catholic faith communities. (p. 53)

Otero and Cottrell (2013) proposed the CoP framework could be drawn upon to train and develop lay adult religious educators and leaders for Canadian Catholic parishes which was sustainable and generative. Even though the literature about the potential of CoPs in the Catholic context was limited, nonetheless, the possible adoption and implementation of the CoP framework in the Catholic context merited further consideration.

### **Precursors of Communities of Practice in the Church**

Otero and Cottrell (2013) indicated from its very beginnings, the Church had precursors of what current educational theory frames as CoPs to train and develop adult religious educators and leaders. It was worth examining the training and development of adult religious educators and leaders historically in their time and context and extrapolate the underlying principles and practices which potentially can be mobilized for contemporary purposes.

Analogically speaking, Jesus Christ established what could be considered a CoP. The domain was to share his teaching, and it was in the context of a community and relationships his disciples developed their practice. Following the Greco-Roman and Jewish teaching models of the first century, Jesus Christ taught small groups, where his disciples were inspired to be preachers and teachers of the faith through bonds of friendship in a small community (Elias, 2002, p. 12; Grassi, 1973, pp. 21–23). Also, Shaw (2014) pointed out Jesus' "primary mode of

leadership training was to mentor his small group of his disciples [in an] intimate and personalized approach” (p. 112). It was noteworthy Jesus Christ and his disciples were lay members of their faith community and were not in formal positions of authority nor were they professional religious educators. It was from this small initial group the Christian faith spread not only throughout the ancient Roman world but eventually throughout the whole world. It was also noteworthy Jesus Christ accepted women as disciples, which was unusual and extraordinary for the ancient world (Grassi, 1973, p. 29). Further, taking into consideration the status of women and social mores in the ancient world, women had active leadership roles, and by inference, were also educators in the faith in the early Church (Elliott, 2010, pp. 14–16, 51–60, 69–73; Grassi, 1973, pp. 121–24).

Another precursor of a CoP in the Roman Catholic context, based on historical research currently available, was the establishment of the *evening chapels* in the 18th century among the lower social classes which inhabited the very poor neighborhoods of the Italian city of Naples. These neighborhood assemblies were called evening chapels because the majority of the participants labored during the day, thus could only attend in the evening (Chiovaro, 2003, p. 38; Rey-Mermet, 1989, p. 176). Established by a Neapolitan priest, Alphonsus Liguori, and his companions, the evening chapels were a structure to engage in outreach and adult religious education adapted for the needs of this population and their social conditions. Rey-Mermet (1989) highlighted the evening chapels were an entirely new approach, not merely an offshoot of existing associations (p. 182). Within a few years there were 75 of these neighborhood centers in the poor areas of Naples (Jones, 1992, p. 64). These small neighborhood assemblies had spread and multiplied so quickly it was necessary to train lay adult religious educators and leaders (Jones, 1992, pp. 62–63; Rey-Mermet, 1989, pp. 174–181).

What was new and extraordinary, clerics adequately trained, often illiterate, lay persons as adult religious educators, and equipped them to assume leadership of and responsibility for these small groups of their peers in their particular milieu (Jones, 1992, p. 63; Rey-Mermet, 1989, pp. 179, 181). Also unique about the evening chapels was Liguori’s intention that these communities promote and establish lay leadership, and lay persons were actually in charge of directing the gathering, with a priest simply as an assistant (Rey-Mermet, 1989, p. 182; Tellería, 1950/1951, p. 179). Given the hierarchical and clerical structures of the Church, the idea of lay people being in charge “was a daring idea far ahead of its time” (Rey-Mermet, 1989, p. 182).

Rey-Mermet (1989) indicated, from its beginnings among the poor ignoble Neapolitans, the underlying ideas of the evening chapels “caught on” in France and even in China ( pp. 182–183). Also remarkable, given the subordinate status of women living in poverty in the social and religious culture of that time and place, Liguori formed a group for women but these did not last due to unending domestic demands (Orlandi, 1987, pp. 407–408; Rey-Mermet, 1989, p. 180).

In summary, even though situated historically and culturally, Jesus Christ’s approach to training his followers to be teachers of the Christian faith and leaders in the Christian community and the evening chapels represented examples of historical precedents of a CoP with respect to the domain of adult religious education, situated learning in community, and developing practice.

### **A Community of Practice Approach to Training**

A CoP approach for church ministry training in lieu of a conventional program in a theological institution or an employee training program highlighted situated, contextual, and relational learning which were characteristic features of a CoP.

**A community of practice approach to church ministry training.** Jolley and Jones (2016) indicated questions were raised about the ability of conventional ministry training programs in theological institutions to adequately equip leaders for ministry in challenging urban contexts noting there was a growing consensus that different types of leadership skills were required for Christian ministry in the contemporary era (p. 34). A recent global survey on theological education (Esterline, Werner, Johnson, & Crossing, 2013) referred to by Jolley and Jones (2016) suggested theological institutions, with their traditional emphasis on academic studies, were quite weak in experiential learning even though field placements to gain practical skills may be included as part of training (p. 34).

Jolley and Jones (2016) also pointed out that although alternative ministry leadership programs showed encouraging results, these programs usually required self-funding and regular travel far beyond the person’s potential ministerial context, and these programs were not context-specific (p. 34). Therefore, Jolley and Jones (2016) asked:

Is it possible to create a supported training pathway specifically to develop confidence and competence for mission within urban contexts, and to train participants close to home? Moreover can we find more and better ways to develop and grow leaders from such contexts? (p. 34)

The Birmingham Mission Apprentice Scheme (BMAS), an innovative initiative of the

Church of Birmingham England, was designed to provide an alternative training pathway for participants close to home in Anglican parishes in challenging urban contexts within the diocese of Birmingham. The BMAS was rooted in the conviction that conventional ministry training programs did not adequately equip and enable people for ministry in challenging urban contexts (Jolley & Jones, 2016, p. 36). Also, the BMAS was conceived as an apprenticeship program (Jolley & Jones, 2016, p. 40).

A cohort of seven persons, referred to as Mission Apprentices, participated in this apprentice-based program. The Mission Apprentices worked half-time for two years in the seven participating parishes, all of which were in challenging urban contexts. All the apprentices had experience living in challenging urban contexts, and a majority of the apprentices were considered members of the communities in which they worked. Being regarded a member of the community was “a key initial objective of the Scheme and was important in avoiding an ‘us and them’ mentality about the people they worked alongside” (Jolley & Jones, 2016, p. 36).

The intention of the BMAS was to invest in training lay leaders from the parishes in different areas of parish ministry and outreach in the contemporary sociocultural environment (Jones, 2014, p. 8). This approach offered a pathway for the apprentices to grow into recognized church or community leaders in their unique parish context in a particular area of ministry. An experienced (ordained) practitioner supervised the apprentices, and they often worked as part of a team of lay and ordained colleagues (Jolley & Jones, 2016, p. 34). Along with experiential learning within the apprentice’s own parish context and other in-parish learning, all the apprentices participated together in a customized central learning program which was designed to give them a strong foundation in a variety of themes related to ministry (Jones, 2014, p. 10). The content of the holistic learning program included theological topics, leadership, and various other themes useful and relevant to parish work (Jones, 2014, pp. 6, 10). The apprentices met fortnightly during term time and had a residential weekend every six months. The BMAS was led by an experienced practitioner who was appointed part-time Mission Apprentice Coordinator. Jones (2014) provided a detailed assessment of the inaugural BMAS in a separate evaluation report which demonstrated the results of the BMAS were very encouraging with respect to the development of emerging leaders and the benefits for the parishes (Jolley & Jones, 2016, p. 35).

Salient to this study was Jolley and Jones’ (2016) evaluation of the BMAS through the mirror of a CoP as a pathway for training and developing lay leaders for parishes and the

viability of an apprenticeship model for church ministry training (p. 44). Jolley and Jones (2016) indicated, “At certain levels, the BMAS was conceived as an experiment in shared learning” (p. 43) which involved not only gatherings of the apprentices with the Scheme’s Coordinator and with a variety of experienced practitioners, but also regular meetings between supervisors and the steering group that in effect, created “a somewhat wider, albeit more diffuse, learning community of participating parishes” (p. 43). Jolley and Jones (2016) indicated the BMAS sought to foster a CoP right from its very beginning but it was only over time the key features of a CoP emerged (p. 44).

Jolley and Jones (2016) emphasized, “From the outset the steering group of the BMAS was keen to draw out any learning from the Scheme which might be transferable from one context to another” (p. 45). Given that the BMAS involved seven parishes, Jolley and Jones (2016) indicated a key challenge of the BMAS with respect to functioning as a CoP was “remaining attentive to the particularities of context whilst also maintaining a functional learning community which transcended parish boundaries” (p. 45). Therefore, Jolley and Jones (2016) stated it was “more accurate to say that rather than constituting one single CoP” the BMAS “consisted of several interconnecting communities of practice, with the learning community of the Mission Apprentices and Scheme’s Coordinator at the centre” (p. 45). Especially with respect to the apprentices’ CoP, the notion of learning through an apprenticeship model was at the heart of the BMAS.

**A community of practice approach to employee training.** Due to the nature of the information technology industry in which new and specialized knowledge was continually created and recognizing the limitations of conventional education programs for employee training, a large corporation introduced CoPs as an alternative learning model for employee training (Choi, 2006, p. 144). The benefits of participating in a CoP were promoted, and employees were strongly encouraged to participate in a CoP and could choose to learn the knowledge and skills they wanted to enhance their performance (Choi, 2006, p. 144). The corporation provided a variety of practical support, such as human and material resources, to foster the development and implementation of CoPs within the corporation.

Even though participation in the corporation’s CoPs was voluntary, CoPs expanded significantly from the first 20 CoPs to 101 CoPs within a six year period (Choi, 2006, p. 144). One CoP generally consisted of about 10 persons. Although existing within a large corporation

with presumably an established organizational structure and hierarchy, the members of these non-hierarchical CoPs elected their leader, selected their domain, that is, the specific topic of their CoP, and decided among themselves how the CoP would manage itself, and how they would learn (Choi, 2006, p. 144).

Choi's (2006) survey findings of employees and teams who participated in a CoP indicated CoPs were an effective model for creating and transferring both explicit and tacit knowledge based on participation and practice in real-world contexts. Employees in an individual CoP were bound together by their shared interest in a particular topic, created and shared work-related knowledge, experience, and expertise, and developed their practice. Choi's (2006) findings found the degree of trust between the CoP's informal leader and its members, and among the CoP members themselves was a significant factor which enabled the CoP to function and especially, to share tacit knowledge (pp. 144–145).

The corporation contributed in three key ways to the employees' willingness to participate in a CoP and the effectiveness of the CoPs as a model for employee training. First, the CoP was legitimized, that is, officially approved as a valuable entity within the corporation (Schiavone, 2014, p. 27). Second, the corporation supported the CoP through directly providing human and material resources (Schiavone, 2014, p. 27). Third, the CoPs were institutionalized, that is, the corporation acknowledged the existence of the CoPs and gave them official status (Schiavone, 2014, p. 27).

**Communities of practice within a larger organization.** Even though distinctly different in the function of a CoP in its unique context, the evolution or implementation of a CoP approach to training for church ministry and an employee training program strongly suggested the relative success of the CoP approach was due in part to the larger organization's endorsement and practical support of CoPs, and allowing them to exist with the larger organization.

Chua's (2006) descriptive case study of one CoP in an educational institution traced its inception, development, and eventual demise despite its promising start. Chua's (2006) findings regarding the reasons for the CoP's demise indicated two key lessons which may be particularly pertinent for CoPs to thrive in the Catholic context with respect to adult religious education work. First, a CoP needed to foster an authentic sense of community and belonging, and commitment to developing social capital and shared ownership of the CoP's domain (Chua, 2006, pp. 125, 127). Relatedly, all the CoPs members must be equally committed. Second, the

goodwill and support of the organization's formal leadership were necessary.

### **Peer Learning and Support within a Community of Practice**

Barker's (2014) empirical study of a group of Church of England "pioneer ministers" in the United Kingdom indicated this group exemplified a CoP. Essentially, recognizing the need to imagine fresh approaches and models to church ministry and moving out of traditional comfort zones, pioneer ministers were persons who were trying new strategies in their unique context (Baker, 2014). Barker (2014) investigated the process of how pioneer ministers might develop as a CoP through interviewing 11 people who self-identified as "pioneers" (pp. 102–103).

Barker (2014) reported this network of pioneer ministers did emerge and identify as a CoP with respect to seeing themselves as pioneer ministers, developing their practice as "practitioners of contextual theology", and peer learning and support (pp. 105–106). However, with this being said, the participants saw themselves belonging to a CoP on two levels. First, at one level, they belonged to a CoP at the base or local level in which they engaged in their practice with others. This meant the distinct practice of each base CoP was shaped and formed by its particular context (Barker, 2014, p. 107).

Second, although each pioneer minister was a member of their CoP at the local level, at another level, they equally belonged to the CoP of pioneer ministers, the "'prime community', which in some way is the 'holding community'. This 'prime community' somehow holds or expresses, the bigger context of these dispersed, or local, communities" (Barker, 2014, p. 106). Thus, there were two layers of learning, and the local practice was informed by the broader network of the pioneer ministers' CoP.

### **Mentorship within Communities of Practice**

A CoP was a particularly apt structure to incorporate both developmental and peer mentorship. By its very nature, mentorship cultivated group work patterns, fostered interdependence among the members of the CoP, and promoted mutually beneficial relationships. Along with stewarding knowledge, developmental and peer mentorship can energize the CoP's members, potentially yielding benefits for the larger organization.

Prytula and Ferguson (2011) explored the positive impact of mentoring and mentoring cultures in the integration of new practitioners in the teaching and nursing professions through participation in a CoP (pp. 89–98). Their key findings highlighted the importance of learning in

community, informal relationships to advance the newcomers' learning and the effectiveness of mentorship within a CoP which facilitated the development of their professional confidence and skills (Prytula & Ferguson, 2011, pp. 98–102).

In addition to developmental mentorship for newcomers, a CoP fostered peer-to-peer mentorship and support. All the members of a CoP, whether novice or expert, can potentially mentor each other in the diverse areas of knowledge relevant to the CoP's area of practice. For example, the membership of a single CoP may include experts and novices, and as well, individuals who possess intermediate levels of knowledge (Klein, Connell, & Meyer, 2005, p. 108). A CoP may have members whose expertise spans the full spectrum of competencies (Klein et al., 2005, p. 108). There can be a continuum of expertise, and individual members may have great expertise in some areas, and not in others. Also, a CoP can include members with different, complementary skill sets, who, in turn, could mentor the other members in specific skill sets. Also, a newcomer may have specialized areas of knowledge which can contribute to the CoP's practice.

Mentoring relationships can develop informally and naturally within a CoP (Tarr, 2010, p. 276). Also, Tarr's (2010) experience in a CoP revealed mentoring occurred in expected and unexpected ways and it can be both direct and indirect (p. 279). Mentorship within a CoP fostered a collaborative and a continuous learning culture which was valuable for learning and growth. Prytula and Ferguson (2011) highlighted, "Members of communities of practice do not work in isolation, but, through the opportunity for discussion and dialogue, they share their practices, support one another, and contribute to each other's learning" (p. 88).

### **Community of Practice Conceptual Framework**

The conceptual framework was inspired by the potential of the CoP framework to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes, especially based on its three structural elements, domain, community, and practice, and its features of situated, contextual, and relational learning. The purpose of reviewing selected literature about CoPs was to develop a conceptual framework to guide data collection and analysis, and the discussion of the study's findings especially in relation to research questions two and three. Another element of the conceptual framework was the notion that CoPs could exist and function within a highly structured organization. The conceptual framework was developed prior to the collection and analysis of data.



## **Chapter Summary**

The review of the first body of literature ascertained the general state of empirical and historical research relevant to parish-based adult religious education from 1983 to the present. The survey of the literature confirmed there is indeed a paucity of knowledge about many topics pertinent to adult religious education context in the conventional scholarly literature. The nature of religious education as an academic discipline was ambiguous given it neither had an academic home in education nor theology. The status of religious education as an academic discipline was even more ambiguous given it was considered a sub-discipline of practical theology which has struggled to find a place in the larger theological academy.

The overview of existing empirical research relevant to parish-based adult religious education in the Canadian Catholic context from 1983 to the present demonstrated there was a significant lacuna in existing knowledge. This section of the literature review provided a persuasive rationale for the value of this study with respect to filling a gap in the knowledge by undertaking a historical study regarding approaches to the training and development of adult religious educators and leaders through the lens of educational administration and leadership. This section of the literature review also confirmed a study of this nature had not been previously conducted.

The review of selected literature about CoPs indicated the key features of a CoP may be one approach to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes. The literature review also demonstrated that there were historical precedents of this approach to train and develop adult religious educators and leaders for Catholic faith communities with respect to situated, contextual, and relational learning.

Chapter Three discusses the research methodology and design.

## **CHAPTER THREE**

### **RESEARCH METHODOLOGY AND DESIGN**

Chapter Three begins with restating the purpose of the study and the research questions followed by a discussion of the constructivist paradigm, educational historiography, case study research, and memoing. The final section of Chapter Three provides an explication of the research methods, a discussion of how the trustworthiness of the study was established, and ethical considerations pertinent to the study.

#### **The Purpose of the Study**

The purpose of this educational historiographical instrumental case study was to investigate what approaches to facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period. Drawing on educational scholarship, especially Lave and Wenger's (1991) work on communities of practice (CoPs), the secondary objective of this study was to analyze these past approaches with respect to their key features and processes and investigate if any of these past approaches exhibited the three structural elements of a CoP, domain, community, and practice, and its features of situated, contextual, and relational learning. Relatedly, Otero and Cottrell (2013) specifically explored the CoP framework conceptually as one potential approach to train and develop adult religious educators and leaders for Catholic faith communities, especially parishes, in the Canadian Catholic context. Therefore, an ancillary objective was to consider the extent to which the CoP framework may be an appropriate approach to train and develop adult religious educators and leaders for Canadian Catholic parishes.

#### **Research Questions**

The research questions which guided this study were:

1. What approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period?
2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

## **The Constructivist Paradigm**

This qualitative study employed the constructivist paradigm. Two basic tenets underlie the constructivist paradigm. First, the epistemological premise is that what is considered valid knowledge is socially constructed by individuals and groups as they develop subjective meanings of their experiences, based on their experiences or interactions with their surroundings, subject to their temporal and historical conditions, and cultural norms (Creswell, 2013, p. 25; Guba & Lincoln, 2005, p. 204). In other words, “constructivism assumes that truth and knowledge and the ways in which it is perceived by human beings and human communities is, to a greater or lesser extent, constructed by individuals and communities” (Swinton & Mowat, 2016, p. 34).

Second, the ontological premise of constructivism is that individuals’ understanding of reality is relativist and there are multiple realities, all of which are considered valid (Creswell, 2013, p. 24; Swinton & Mowat, 2016, p. 34). Therefore, reality is always filtered through a process of interpretation and is influenced by a number of social, cultural, spiritual, and interpersonal factors, including those of the researcher (Creswell, 2013, p. 25; Swinton & Mowat, 2016, p. 35).

Swinton and Mowat (2016) emphasized the quest in the constructivist framework “is not for objectivity and explanation (as per the natural sciences), but for *meaning* and a deeper *understanding* of situations” (p. 36). The implication for research is to appreciate that constructivism is an interpretivist approach.

### **The Interface between the Constructivist Paradigm and the Catholic Worldview**

At its core, the constructivist paradigm is a secular paradigm which refuses the notion there are any permanent and unvarying standards by which truth can be universally known (Guba & Lincoln, 2005, p. 204). Guba and Lincoln (1982) stated, “Religious faiths are based on *theological* paradigms, most of which hold that necessary truth is directly revealed” (pp. 233–234). Swinton and Mowat (2016) argued, “All commitments to bodies of knowledge and epistemic systems are foundationally faith commitments” (p. 84).

A key Catholic theological understanding is that the Church, the community of faith in its various expressions, is seen having two concurrent realities, a spiritual one and a human one (Catholic Church, 1993, paras. 770–771). First, the Church is a spiritual reality with a transcendent dimension. Second, the Church is also a visible community that exists in history as a human organization. This does not imply dualism. Although constructivism is a secular

paradigm, the epistemological boundaries between constructivism and a Catholic worldview with its understanding of revealed truth needs to be acknowledged and respected.

With respect to the interface between constructivism and theology, Swinton and Mowat (2016) stated:

The question is, do we have enough self-awareness and reflexivity to be sufficiently aware of our own commitment to a body of knowledge that we can recognize as having dimensions within it that *are* social constructs and that *do* require a more critical and less dogmatic position? (pp. 84–85)

Engaging in theology is also an interpretative enterprise in the sense that sources of divine relation are interpreted by human beings who may be influenced by their context and may have various personal and denominational agendas (Swinton & Mowat, 2016, p. 85).

The Catholic tradition has a rich and diverse intellectual heritage (Hughes, 2001, pp. 59–60). At its best, this intellectual tradition affirmed the study of human sciences, respect for non-Catholic secular culture, and was hospitable to other forms of knowledge (Second Vatican Council, 1965b, para. 59; Hughes, 2001, pp. 61–63). Hughes (2001) indicated the Church was not averse to drawing upon other spheres of inquiry outside theology as these realms possessed their own intrinsic legitimacy (pp. 62–63). The Catholic intellectual tradition encouraged intellectual inquiry and the search for truth wherever it may be found. The universalism of Catholicism counteracted rigid orthodoxy and dogmatism whether it was religiously based or based on secular philosophies (Hughes, 2001, pp. 66–67). It was possible to adopt a nuanced position and not confuse theological premises with legitimate ways of knowing in the secular world. Nor did they need to discount the other nor be in competition with each other. With respect to applying the constructivist paradigm to research in religious education, Crain (2006) stated:

Scholars and practitioners in religious education are probably close to unanimity on this issue. We understand that cultures of faith communities are socially constructed. To discover their constructed meanings, we must inquire into the meanings ascribed by the participants. These cultures are highly tied to their contexts. They are therefore complex and multidimensional. (p. 438)

In addition, Hyde (2015) explained the implications and contributions of constructivism to research in religious education, particularly in case studies, in which the research focuses on

“describing a phenomenon in its essence . . . [and] ascribes meaning in relation to particular phenomena associated with issues pertinent to religious education” (p. 299).

### **The Constructivist Paradigm and Documentary Analysis**

Jupp and Norris (1993) proposed three theoretical paradigms, positivist, critical and interpretive, to analyze and interpret documents. Given that documents were the principal and major source of data for this study, it was important to consider the implications of constructivism, as an interpretivist approach, for documentary analysis. Analyzing documents through a constructivist lens, Jupp and Norris (1993) emphasized documents were socially constructed by individuals in their historical context and the discourse of their time (p. 42). Therefore, documents should not be considered objective but rather “as ‘social constructions’ by particular individuals at particular times which could be the object of varying interpretations by different ‘audiences’, with varying effects” (Jupp & Norris, 1993, p. 38).

Robinson (2010) also highlighted documents needed to be understood as social and historical constructs, and seen in the context they were created (p. 190). Thus, in the constructivist paradigm, for the purposes of analysis and having an interpretivist outlook, the data in documents used in an inquiry needed to be understood as social and historical constructions (McCulloch, 2011a, p. 254).

### **Educational Historiography**

The fields of history and education are two distinct long established academic research disciplines and vast domains of knowledge that have resulted in the history of education having an ambiguous academic identity and location in the academy (McCulloch & Richardson, 2000, pp. 27–40; Reese & Rury, 2008, p. 2). Reese and Rury (2008) pointed out the history of education had never been a single academic entity as its practitioners were housed either in education or history departments (p. 2). This situation was further complicated by social scientists who extended their interests to history and education (McCulloch, 2011b, p. 4). Therefore, historical research in education had been conducted in different academic settings from various perspectives and for different purposes.

Quantitative or mixed methods approaches to historical research in education can be used but generally speaking, educational historiography falls within the qualitative research tradition (Johnson & Christensen, 2014, p. 51). Edson (1986) explained that history, like other qualitative approaches to research, shared four hallmarks of qualitative inquiries: (a) concern for the specific

context of the study, (b) conducting research in natural settings rather than abstract or theoretical settings, (c) appreciating the wholeness of experience, and (d) interpreting and explaining the significance of experience (pp. 15–18). Edson (1986) highlighted that historical inquiry was context-specific, and historical research was not only about the past but also the present so as to understand the continuity between the past and the present as part of the whole that was being investigated (p. 16).

Educational historians, Edson (1986) and Rury (2006), emphasized, in different ways, how interpretation in the research process was central to all qualitative research, and how interpretation played a crucial role in historical inquiries in education. Edson (1986) stated, “Qualitative research in education connotes a subjective process of understanding and assessing educational phenomena” (p. 13). With respect to historical studies in education, Burstyn (1987) emphasized history was not merely a chronicling of the past, but rather that historians construct history, even if unaware of their subjectivity, through the selection of sources and data, and then the analysis and interpretation of data (p. 167).

Historical inquiry and its application within the field of education in the English-speaking world dates back to the early 19th century and traditionally focused on the formal schooling of children and youth (McCulloch & Richardson, 2000, pp. 34–39). However, McCulloch and Richardson (2000) indicated, towards the end of the 20th century, the emergence of new ideas and policies challenged the assumption that educational settings “should normally be institutionalized, bureaucratic, and age-specific” (p. 6). The notion of lifelong learning and the suggestion that formal or informal education for different social groups can occur in a wide range of settings highlighted that many agencies and arenas other than the modern school could also count as educational settings (McCulloch & Richardson, 2000, p. 6).

Along with other types of educational institutions and forms of education, for example, universities, apprenticeship and adult education, this expanded view of education appreciated that learning occurred throughout life and in many different settings, and that other institutions such as the family, churches, and the workplace had an educative role (McCulloch, 2011b, p. 7; McCulloch & Richardson, 2000, pp. 6, 44–47; Reese & Rury, 2008, p. 2). For example, informal learning through participation in religious organizations and trade union membership often coexisted with conventional schooling (Andrew, 1985, p. 155). This broader understanding of education contributed to the growth and development of historical inquiry in

education beyond the history of formal schooling, dealing with many sites and facets of educational practice, the education of marginalized populations, and educational experiences in different eras (McCulloch & Richardson, 2000, p. 6; Reese & Rury, 2008, pp. 2–7).

As a branch of educational research, educational historiography evolved and went through different phases and waves (McCulloch & Richardson, 2000, pp. 27–51). Reese and Rury (2008) pointed out, that as a field of study, the history of education, and its subfields, was a dynamic, eclectic, and evolving academic specialty that produced a large body of scholarship on a wide range of questions and topics from various scholarly viewpoints and ideological perspectives (p. 7).

McCulloch (2011b) and Reese and Rury (2008), in their respective overviews of the development of the history of education, indicated educational historiography had its own complexities because it drew on historical, educational, and social scientific methods and insights. Given the intersection of these three research traditions, there was not one established theoretical and methodological approach to educational historiography. Therefore, historical research in education employed a wide variety of methodologies and theoretical frameworks.

Given the broad scope and diverse nature of the work in the field of educational history, different theoretical and methodological approaches to historical research in education potentially may enhance an understanding of the educational past (McCulloch, 2011b, p. 75). The strengths of history and the empirical social sciences potentially allow educational historians to draw on a range of tools with which to undertake research in educational history (McCulloch & Richardson, 2000, p. 49). McCulloch and Richardson (2000) emphasized different social sciences, including organization theory and management, could contribute to historical studies in education (p. 77). The discipline of educational administration and leadership can be considered as one specialized dimension in the broad field of organizational studies.

The training and development of adult religious educators and leaders falls within the wide-ranging field of adult education theory and practice. Merriam and Brockett (2007) indicated adult education history was a rich resource for providing perspectives on the past (pp. 74–75). Merriam and Brockett (2007) outlined three benefits of studying the history of adult education: information, insight, and inspiration. First, historical information, that is, facts and chronology, described when and how a particular development in adult education evolved, and more importantly, the larger context in which a development unfolded (Merriam & Brockett,

2007, pp. 67–68). Second, studying the history of adult education can provide insight into current issues and problems of adult education practice (Merriam & Brockett, 2007, pp. 68–71). Third, historical study may lead to an appreciation of adult education’s rich heritage which can provide inspiration for contemporary adult education practice (Merriam & Brockett, 2007, pp. 72–74).

Relevant to this historical inquiry about approaches to training and developing adult religious educators and leaders for Canadian Catholic parishes, Welton (2013) stated adult education history was usable in three key ways (pp. 8–9). First, history provided a critical vantage point on the present. Second, studying the past can shed light on the often difficult circumstances in which bold and courageous adult education projects were launched. Third, historical studies may be a useful way of generating theories about current themes and issues that have to be addressed. Therefore, historical inquiry regarding the training and development of adult religious educators and leaders for Canadian Catholic parishes does have value if historical knowledge provides the means and tools through which we ask new questions about the past in light of contemporary concerns, and examine new options for the present and the future. Historical inquiry may also provide empirical corroboration of constructivism that demonstrated that events were shaped by individual and collective human agency.

Educational historiography generally fell within the qualitative research tradition. Historical research in education not only helps us learn about past educational practices in their time and context but may also point to underlying principles worthy of deeper examination which potentially can be extrapolated and mobilized for contemporary purposes.

### **Documentary Research in Educational History**

Documentary research was the primary strategy employed in this study, and correlatively, written documents were the major source of data. McCulloch (2011a) indicated almost anything that was printed or written down can represent a document that can be used in the historical research of education (p. 249). Documentary sources of data in historical research included primary and secondary documents.

McCulloch (2011a) explained, “Primary documents are produced as a direct record of an event or process by a witness or a subject involved in it” (p. 249). A wide range of primary documentary sources can be utilized as the basis for a historical inquiry in education. Examples of primary documentary sources are autobiographies, books, textbooks, diaries, official records,



letters, reports and proceedings, newspapers, periodicals, other media sources, and online and virtual documents (McCulloch, 2011a, pp. 249–252; McCulloch & Richardson, 2000, p. 86).

Secondary documentary sources are works written about a particular topic by those who were not part of the event or issue, and were created through an analysis and interpretation of both primary and secondary documents about a specific historical issue (McCulloch, 2011a, p. 249; McCulloch & Richardson, 2000, pp. 79–81). Secondary documentary data sources for historical research in education mainly include “published books, articles in academic journals, chapters in edited collections, and unpublished masters and doctoral theses” (McCulloch & Richardson, 2000, p. 81). The dichotomy between primary and secondary documents is not always clear, and should be regarded along a continuum (McCulloch, 2011a, p. 249; McCulloch & Richardson, 2000, p. 80). Depending on how a particular document is utilized in a study, it may be regarded as either primary or secondary, or both primary and secondary (McCulloch, 2011a, p. 249).

Documentary sources of evidence may be published or unpublished depending upon their ease of access to researchers (McCulloch & Richardson, 2000, p. 86). Published documents are those that are accessible to researchers. Generally speaking, many primary and most secondary documentary sources are published (McCulloch & Richardson, 2000, p. 80). Unpublished documents and records may be found in public archives, or in private hands, for example, private correspondence or a personal diary, or in private archival collections which may have restricted conditions of access (McCulloch & Richardson, 2000, p. 86).

Bowen (2009) suggested that documents can serve a variety of research purposes (pp. 29–31). Salient to this study, Bowen (2009) outlined two specific purposes documents can serve. First, documents can potentially provide data on the study’s background and context. This information “can help researchers understand the historical roots of specific issues and indicate the conditions that impinge upon the phenomena currently under investigation” (Bowen, 2009, pp. 29–30). Second, information in the documents may generate interview questions for research participants in a study (Bowen, 2009, p. 30).

Particularly relevant to this study, interviews offered another source of data to supplement the documentary data (Saran, 1985, pp. 14, 207–208, 230). However, the interview transcripts in this study were not considered documentary sources of evidence because the transcripts did not exist prior to the study (Merriam, 2009, p. 140). The transcripts were

produced for the purposes of the study (McCulloch, 2011a, p. 249; Silverman, 2006, p. 153).

Documents are potentially rich sources of empirical data in qualitative case studies such as this educational historiography (Bowen, 2009, p. 29). Apart from documentary research, another source of data and method of collecting data are interviews (Bowen, 2009, p. 28). Data derived from interviews may supplement documentary data.

### **Document Analysis**

The trustworthiness of documents used in a study is critical. Several scholars highlighted that documents did not speak for themselves but had to be carefully and critically examined and assessed for their authenticity, accuracy, credibility, and representativeness to ascertain their trustworthiness (Bowen, 2009, p. 33; Linders, 2008, p. 479; McCulloch 2011a, p. 253; Merriam, 2009, p. 151; Robinson, 2010, p. 186). Authenticating the document meant verifying the author, and the place and date the document was produced (McCulloch, 2011a, p. 253). The credibility of each document needed to be evaluated in terms of its truthfulness and accuracy, and if the biases, interests, and perspectives of the author or the producers of the document were reflected (Linders, 2008, pp. 476–479; McCulloch, 2011a, p. 253; Robinson, 2010, pp. 190–191).

Apart from assessing the trustworthiness of a document, the researcher must make efforts to ensure the trustworthiness of their interpretation and any meaning they attached to the data in the document. Robinson (2010) emphasized seeking meaning in the documents was the heart of documentary research (p. 190). With respect to gathering, analyzing, and interpreting data from the documentary sources, the researcher “aims for interpretive understanding of historically situated data” (Charmaz, 2014, p. 236). As much as is possible, the researcher needs to situate documents in their particular contexts and have sufficient knowledge to read these documents with in-depth understanding because the documents may tell a story behind the texts, suggesting the social context for the analysis (Charmaz, 2014, p. 53).

Along with establishing the trustworthiness of a document, several scholars detailed helpful questions to ask and key strategies to employ to critically evaluate and ascertain the meaning of a particular document (Bowen, 2009, pp. 33–34; Charmaz, 2014, pp. 52–54; Linders, 2008, pp. 476–481; Merriam, 2009, pp. 150–153). Foundational to analyzing any document, it was important to keep in mind who produced the document, what its purpose was, and who its intended audience was. At a deeper level of analysis, it was critical to consider if the document reflected any biases or underlying assumptions and values, was truthful, what was

included or omitted, or if it was produced under any conditions or constraints (Linders, 2008, pp. 477, 479; McCulloch 2011a, p. 253). Another way of ensuring the trustworthiness of the researcher's interpretation was if the same type of data item reappeared in various documents over a period of time (Linders, 2008, p. 477; Robinson, 2010, p. 191). The researcher must also be open to the possibility that the documentary data may offer other perspectives on the topic.

Even though documents may be rich sources of data and have many advantages (Bowen, 2009, p. 31; Robinson, 2010, p. 187) documents may have limitations. Documents may have insufficient detail pertinent to answering a research question (Bowen, 2009, pp. 31–32). Alluded to earlier, documents may reflect biases or may contain inaccurate information which may compromise their value in a study. Also, documents may be missing, or be destroyed or lost, or may be inaccessible to the researcher. In designing a study utilizing documentary sources, these limitations must be carefully considered as to how they may impact the study.

Like any other study utilizing data from documentary sources, pertinent to this study, in gathering, analyzing, and interpreting data from the documentary sources, the broader ecclesial and sociocultural context needed to be taken into account (McCulloch, 2011a, p. 253). My prior knowledge of the broader ecclesial and Canadian sociocultural context of the 1983 to 2011 period was supported by ongoing and interdisciplinary collateral reading in cognate fields during the research process which enhanced the understanding of the documents produced during this period. Multiple external and verifiable readings provided different viewpoints about aspects of adult religious education policy and practice following the Second Vatican Council.

The quality and trustworthiness of documents in terms their authenticity, accuracy, credibility, and representativeness are essential considerations in utilizing documentary sources in a study. Along with establishing the trustworthiness of a document, employing a variety of strategies contributes to evaluating, ascertaining, and interpreting the meaning of a particular document.

### **Case Study Research**

Gall, Gall, and Borg (2007) succinctly explained the purpose of case study research was “to shed light on a **phenomenon**, which is a process, event, person, or other item of interest to the researcher” (p. 447). Within the field of educational research, there are nuanced variations in how case study is defined (Creswell, 2013; Merriam, 2009; Stake, 1995; Yazan, 2015; Yin, 2014). Congruent with other definitions, Merriam (2009) defined case study “as an in-depth

description and analysis of a bounded system” (p. 43). Merriam (2009) further explained case study was defined as a bounded system because the study focused on a particular unit of analysis, that is, the case or phenomenon being investigated which was set in a particular context or place, and time that enabled the case to be bounded, that is, fenced in within certain parameters (Merriam, 2009, pp. 40–43). Therefore, case study research is generally characterized by three delimitations. The first delimitation is the case, that is, the particular phenomenon, which is the focus of the investigation. Second, the case to be studied is located in its own context. Third, the case is delimited temporally. Therefore, briefly speaking, a case study is delimited by a particular phenomenon to be investigated in its own context over a defined period of time.

There are different types of case studies and diverse approaches to designing and conducting case study research which can be employed to address a great variety of research questions about a very broad range of topics (Cohen, Manion, & Morrison, 2011, pp. 289–293). A case study is also characterized by data collection involving multiple sources of information, for example, documents and interviews (Creswell, 2013, p. 97).

According to Merriam (2009), even though case studies frequently focus on contemporary real-life contexts and issues, historical studies are one form of qualitative case studies (p. 47). Merriam (2000) stated, “The key to historical case studies . . . is the notion of investigating the phenomenon over a period of time. The researcher still presents a holistic description and analysis of a specific phenomenon (the case) but presents it from a historical perspective” (p. 47). A predominantly historical case study may advantageously overlap with investigating a contemporary educational phenomenon and a case study can include historical data (Merriam, 2009, p. 39). Yin (2014) explained a historical study can be conducted about relatively recent events and historical methods can overlap with case study methods (p. 12). According to Yin (2014), the unique strength of a case study, in comparison to a conventional document-based historical study, is case study research has the ability to deal with other types of evidence, for example, interviews, which are not usually part of the historian’s repertoire (p. 12).

Stake (2005) suggested, “Case study is not a methodological choice but a choice of what is to be studied” (p. 443). In other words, case study research is about choosing what is to be studied, and accordingly, selecting a particular case study research design and methods that aligns with the study’s purpose and research questions. What approaches were undertaken to

facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes was the phenomenon being investigated in this case study; it was delimited within the English sector of Catholic Church in Canada, and within the 1983 to 2011 period.

Stake (2008) explained that an instrumental case study is “if a particular case is examined mainly to provide insight into an issue or redraw a generalization. The case is of secondary interest, it plays a supportive role, and it facilitates our understanding of something else . . . . Here the choice of case is made to advance understanding of that other interest” (p. 123). A qualitative instrumental case study research design was selected because it suited the focus and purpose of this study. This study was an instrumental case study because it was instrumental, that is to say, it was a means to illustrate and gain insights into specific concerns and issues pertinent to the training and development of adult religious educators and leaders for Canadian Catholic parishes (Cohen et al., 2011, p. 291; Creswell, 2013, p. 99).

### **Memoing**

Grounded theory researchers have long promoted memoing and proposed different approaches to memoing and how to classify and organize memos depending on their purpose (Birks, Chapman, & Francis, 2008; Birks & Mills, 2015; Charmaz, 2014; Corbin & Strauss, 2015). Furthermore, Saldaña (2016) described all memos as being analytical (p. 44) and, as adapted to this study, proposed various matters to reflect upon and write about during the research process:

- how I personally related to the phenomenon and/or the research participants;
- the code choices and their operational definitions;
- emergent patterns, categories, and themes;
- the possible links, connections, and overlaps among the codes, patterns, categories, and themes;
- any problems with the study;
- any personal or ethical dilemmas with the study; and
- tentative answers to the research questions (p. 53).

Saldaña’s (2016) suggestions were helpful with respect to writing memos. With this being said, flexibility and freedom were necessary to develop and maintain memoing strategies that were appropriate for my study (Birks & Mills, 2015, pp. 42–43, 46–47). As will be discussed in more detail later, from the outset of the study, I kept two sets of memos

concurrently which I designated as *operational* memos and *personal* memos. Briefly, in both sets of memos I wrote about almost anything and everything that came to mind throughout the entire research process—ideas, musings, insights, questions, and reflections. Initially, each set of memos had a distinct purpose and content. However, as the study progressed, the memos became increasingly more analytical.

## **Research Methods**

An overview of the sources of data for this study, data collection and analysis, evaluative criteria to establish the trustworthiness of the study, and ethical considerations are presented in this section of Chapter Three.

### **Sources of Data**

Relevant to the purpose of the study and answering the research questions that were posed, the principal and major source of data were a variety of documents. The documentary data sources were supplemented by individual interviews with five research participants.

**Documents.** An exhaustive search was undertaken to identify national level written documentary sources pertinent to non-formal and informal adult religious education policy and practice in the Canadian Catholic context, especially in parishes. A documentary source was considered to be national level if it was (a) published by the CCCB, (b) a periodical, or (c) generally representative of the Canadian experience. Also, in judging the value of a national level documentary source, it was asked if it contained information or insights pertinent to the study's purpose and research questions (Merriam, 2009, p. 153).

This process began by reviewing known relevant documentary sources which snowballed into identifying and reviewing other useful documentary sources. Through this very thorough search, primary and secondary published written documents and secondary unpublished written documents were identified, selected, accessed, and collected (see Appendix A). Once documentary data sources were selected, they were classified as a primary or secondary document. A document was deemed to be a primary document if the author of the document was directly involved and produced the document during the time of their participation or very close to this time the document was written (McCulloch, 2011a, p. 249). All other documents used in this study were classified as secondary written documentary data sources.

Listed below are the national level documents that were reviewed from which relevant primary and secondary written documentary data sources were identified and selected for this

study:

- the CCCB's three major publications about adult religious education (CCCB, 1986; CCCB, 1993; CCCB, 2011);
- all issues of *Caravan*, a national level practitioner publication about community- or parish-based adult religious education, a total of 71 issues published quarterly between 1987 and 2004 under the auspices of NORE; ceased publication 2004; implicitly may be considered to be a major historical record and overview of adult religious education practice in the Canadian Catholic context because it was representative of the Canadian experience from coast to coast including the experiences of the Church in Québec, urban and rural areas, the Canadian far north, and of Canada's Indigenous Peoples;
- *Insight*, a Canadian refereed journal about adult religious education topics published only four times, once annually in 1987, 1988, 1990, and 1991 under the auspices of NORE;
- CCCB President's Report, Annual Plenary Assembly, 1983 to 2011;
- all issues of *Kerygma* 1983–1993 (Volumes 17–27), a periodical published by the Institute of Mission Studies, Saint Paul University, Ottawa, ON; ceased publication 1993;
- all issues of *Mission: Journal of Mission Studies* 1994–2009 (Volumes 1–16), a periodical published by the Institute of Mission Studies, Saint Paul University, Ottawa, ON; ceased publication 2009;
- all issues of *Theoforum*, 1983–2011, a peer-reviewed journal published by the Faculty of Theology, Saint Paul University, Ottawa, ON; and
- *The Catholic Register*, Canada's major English-language Catholic weekly, fall issues regarding the CCCB's autumn annual plenary assembly, 1983 to 2011.

Also, additional secondary published documentary data sources relevant to this study were identified through a literature search. These secondary published documentary sources included original qualitative and quantitative and mixed methods studies and other types of scholarly writing. Except for the CCCB's three major documents about adult religious education (CCCB, 1986; CCCB, 1993; CCCB, 2011), an international report (IFARE, 1995), Kowalchuk's (2015) commissioned evaluation study, Kuzmochka's (2014) Doctor of Ministry thesis, and the articles from *Caravan* and *Kerygma*, all the primary and secondary published sources were peer-reviewed publications. There were no concerns regarding the authenticity of any of the written documents. Selected data items from these documentary sources were collected and

reconstituted as primary data to answer this study's research questions.

All the primary and secondary published documentary sources were accessible in the public domain. The published documents that were not available electronically or available to be reviewed on site at the University of Saskatchewan were borrowed from Canadian university library collections. The two secondary unpublished documentary sources, a private report about an international meeting of adult religious educators and leaders (IFARE, 1995) and a private study about lay ecclesial ministers in Canada (Rompré & Peacock, 2004) were not in the public domain and were accessed through private contacts. Permission to use data from these documentary sources was formally requested and granted from the appropriate persons.

**Interviews.** Five research participants were selected through a purposeful sampling strategy as key informants to augment data collected from documentary sources. Participants were chosen because of their knowledge and ability to shed light on various issues relevant to parish-based adult religious education due to the variety of their current or past leadership roles in the adult religious education enterprise in the Canadian Catholic context (Patton, 2015, p. 268).

Each prospective research participant was informally approached to request their participation in this study (see Appendix B). The prospective research participants were advised the interview data were intended to supplement data in documents which were the principal source of data. A formal letter of invitation (see Appendix C) was sent to each research participant following their informal consent to participate in the study. Given their relatively senior personal status and office they currently hold or held in the past in the Canadian Catholic Church, none of the research participants required permission from a superior to participate in this study.

Following an explanation of the nature and purpose of the study, the prospective research participants were supportive and expressed willingness to participate because they perceived the potential value of this study. However, anticipating the possibility of sensitive data being collected in the interviews, concerns surrounding issues of confidentiality were discussed in the preliminary informal communications with the research participants. Therefore, understanding and respecting the research participants' personal requests for confidentiality, it was deemed essential to ensure their confidentiality was safeguarded and maintained. Thus, so that the research participants could not be identified, no identifying characteristics such as age, gender,



current or past office(s) or role(s) in the Church, or location were provided. The fact that the research participants had various leadership roles in different Catholic entities or organizations in Canada improved the level of confidentiality. None of these entities or organizations were specifically identified, nor were their general or specific geographical location within Canada. Also, a commitment was made to the research participants that only aggregated, and implicitly paraphrased, data from the interviews would be reported. No individual research participant would be directly quoted. This commitment was articulated in the application for ethics approval to the University of Saskatchewan Behavioural Research Ethics Board and the Participant Consent Form (see Appendix D).

Recognizing the possible limitations regarding what could be reported from the interview data and considering how to deal with the challenges of how to present this data, it was nevertheless decided to proceed with the interviews as a technique for methodological and data triangulation. The interview data were intended to supplement the documentary data. It was believed the data from the research participants' experiences of the on the ground realities, and issues regarding training and developing adult religious educators and leaders for the parish milieu, would contribute to addressing this study's research questions even though this data would be presented in aggregated form. As an exception to this, as the study progressed, permission was obtained from one research participant to present data from the interview in one section of Chapter Four because of its contribution to understanding the potential of community-based approaches to facilitate the training and development of adult religious educators and leaders for parishes.

### **Data Collection**

Documentary research supplemented by interviews were the two data collection methods in this study. This study had two phases of data collection. In the first phase, data from the documentary sources were collected. An analysis of this collected data was undertaken to review preliminary findings. Based on these preliminary findings, to supplement and elaborate upon the documentary data, interview questions for the second phase of data collection were developed (see Appendix E). The preliminary analysis of documentary data informed the development of the interview questions and the direction and focus of the interviews.

Individual interviews were conducted with five research participants. Given the likelihood of only one opportunity to interview each research participant, it was preferable to

conduct a shorter case study interview which was a one-hour focused conversation (Yin, 2014, p. 111). Since the research participants had different leadership roles in the adult religious education enterprise in the Canadian Catholic context, Patton's (2015) *interview guide* approach was appropriate to interview research participants in a shorter case study interview because the interview guide helped "make interviewing a number of different people more systematic and comprehensive by delimiting in advance the issues to be explored" (p. 439). The benefits of the interview guide approach in this study were that it listed the questions or issues that were to be explored in the course of the interview. An interview guide was prepared to ensure that the same basic lines of inquiry were pursued with each research participant. The guide provided predetermined topics or subject areas within which the interviewer was free to explore, probe, and ask questions that would elucidate and illuminate any particular issue (Patton, 2015, p. 439). The research participants were given the interview questions prior to the interview so that they could have adequate time to consider their responses if they so wished to do so (see Appendix E). Three of the five research participants brought prepared notes to the interview.

Along with being able to tailor the questions for the individual research participant, another advantage of the interview guide was that it facilitated making the best use of the interview time. This was especially salient in this study because there was only one opportunity to interview each research participant. Each interview was conducted in-person and digitally (audio) recorded. Each research participant signed the Participant Consent Form (see Appendix D).

### **Data Analysis**

Like in all qualitative approaches to research, analysis of the data was at the heart of a case study employing historical methodology. In essence, data analysis is the process of making sense of data to answer the research question (Cohen et al., 2011, p. 537). Merriam (2009) described data analysis as the process of making meaning (pp. 175–176). Right from the very beginning of data collection, memoing was an analytic strategy employed in this study with respect to making sense out of the data, and reflecting on coding processes and code choices (Saldaña, 2016, p. 44). Systematic analysis involved memoing, identifying and selecting the data sets and items from the data corpus, and processing the data through first and second cycle coding processes (Saldaña, 2016).

The data in this study were coded manually rather than using CAQDAS. Yin (2014)

warned, “Even under the best of circumstances, nearly all scholars express strong caveats about any use of computer-assisted tools when dealing with case study data. . . . Indeed, most case studies pose a serious challenge in efforts to use computer-assisted tools” (p. 135). Generally speaking, case study evidence is derived from diverse sources, including archival documents (Yin, 2014, p. 135). Yin (2014) explained that unless all the evidence that has been collected was converted into the needed textual form, CAQDAS could not readily handle a diverse array of data (p. 135).

The data for this study were extracted principally from documentary sources and supplemented by interview data. Analysis of the documentary sources initially involved reading the document to identify the relevant information and to separate it from that which was not relevant to the study (Bowen, 2009, p. 32). Later, it was necessary to consolidate, reduce, and interpret what people said in the interviews (Merriam, 2009, pp. 175–176). Each interview transcript was audited, that is, listened to, against the original digital audio recording to ascertain its accuracy. This auditing was considered very important for providing “close contact and familiarity” (Boyatzis, 1998, p. 45) with the data “and, consequently, gaining confidence in its overall trustworthiness” (Tuckett, 2005, p. 34). Like the documentary data, following the auditing process, each transcript was carefully re-read several times. Data, whether descriptive or inferential information, from portions of the interview transcripts relevant to the research questions were coded (Miles, Huberman, & Saldaña, 2014, pp. 85–86).

Given the need to uncover deeper and more complex meaning in both the documentary and interview data, it was decided not to use CAQDAS. No advantages were perceived in using CAQDAS in this particular study. Meyer and Avery (2009) indicated Microsoft Office Excel 2013 had many features and capabilities useful to store, organize, manage, display, and analyze qualitative data. The data in this study were derived from documentary sources and the interview transcripts, and were organized and managed in an Excel database. The interviews were audio recorded and then transcribed verbatim into a Word document from which the data were extracted and recorded in the Excel database. All the data and memos were brought together and organized in a case study Excel database so that all the data and memos were manageable and easily searched, retrieved, and manipulated (Merriam, 2009, pp. 203, 207).

This study had two discrete sets of data derived from documentary sources and interviews. Data analysis in this study was not a linear process. It was a dynamic, emergent, and

iterative process. The data analysis process involved careful re-reading and review of the documentary and interview data as progress was made in uncovering and developing the major themes derived from the data, and at the same time, integrating the interview data with the documentary data. Inductive reasoning was a key approach in this study (Kaestle, 1997, p. 126; Rury, 2006, p. 323). The codes, the summarization of the codes into categories, and eventually the major themes were generated inductively from the data.

Saldaña (2016) divided coding into two major stages, first cycle and second cycle, and outlined various coding methods for each cycle. Saldaña (2016) defined a code as “most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (p. 4). The part of data coded during first cycle coding processes can be a single word, a single sentence, a paragraph, or any other type of text the researcher deems meaningful to the study and the same portions of data can be coded in second cycle coding processes (Saldaña, 2016, p. 4).

The documentary and interview data were coded separately, using holistic coding for first cycle coding, and pattern coding for second cycle coding. An exploratory method of coding, Saldaña (2016) explained, “*Holistic Coding* applies a single code to each large unit of data in the corpus to capture a sense of the overall contents and the possible categories that may develop” (p. 165). Given the nature of this study and that data were being collected from a variety of documents and interview transcripts, holistic coding was appropriate for first cycle coding in this study because codes were assigned to data “chunks” in attempting to grasp the initial issues or themes in the data (Saldaña, 2016, pp. 165–166). This holistic coding was the basic groundwork for second cycle coding, pattern coding. Pertinent to this study, pattern coding was appropriate to condense the data from first cycle holistic coding into more meaningful units which identified emergent themes (Saldaña, 2016, p. 236).

The supplementary interview data were compared with the documentary data. The process of comparing the interview data with the documentary data involved identifying, matching, and recording similarities and patterns based on the themes emerging from the documentary data. This process included recording the frequency of certain commonalities found in the interview data. Also, this process included concurrently watching for any differences, outliers, or minority opinions or perspectives, or even themes that did not emerge from the documentary data. Based on the emerging themes from the documentary data, these

interview data items were then clustered, and in turn, integrated into each major theme in an aggregated form. The process of data analysis is depicted below (see Figure 3.1).

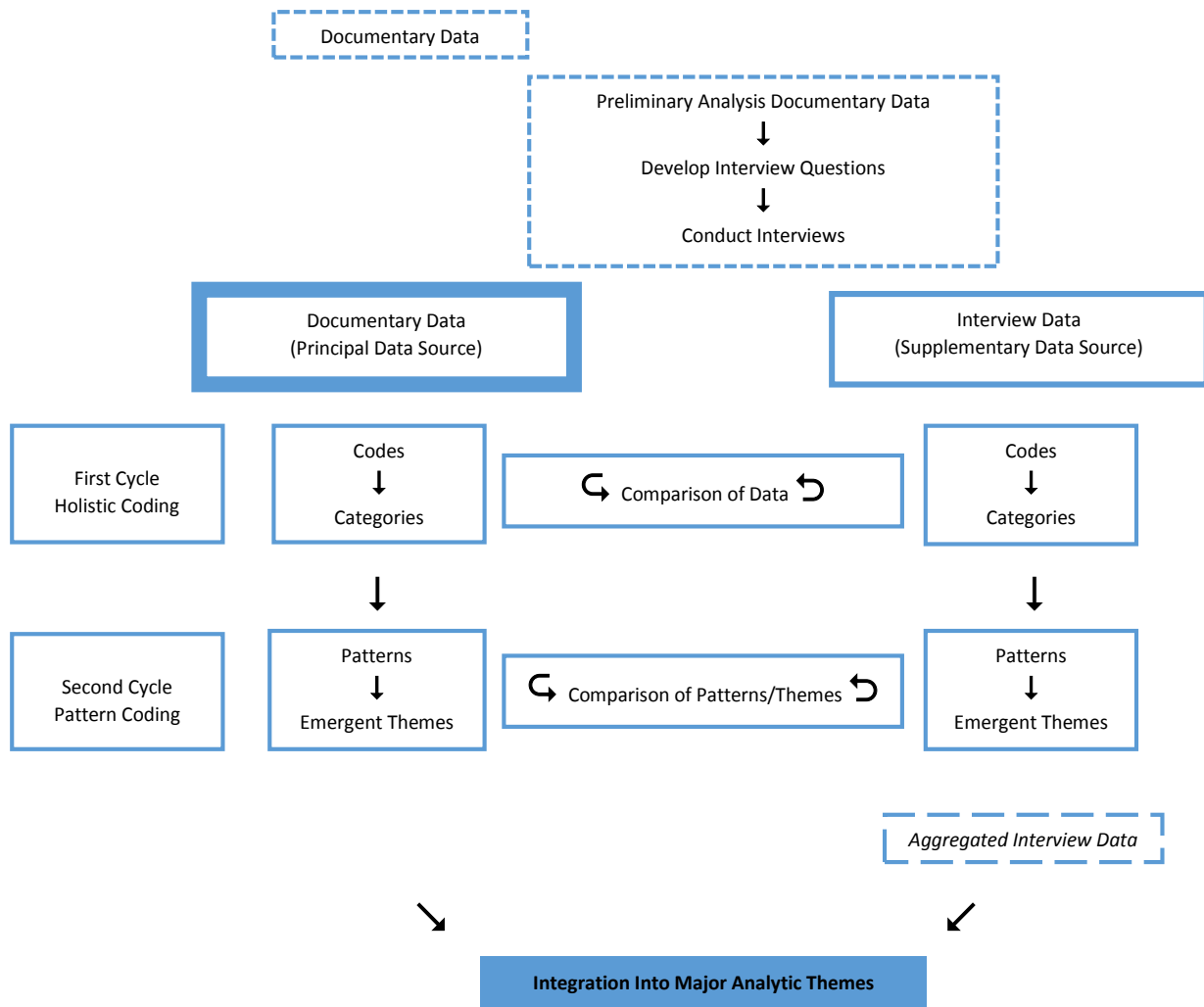


Figure 3.1. Process of data analysis. Inspired by Creswell (2016) and Saldaña (2016).

### Trustworthiness of the Study

The evaluative criteria for qualitative studies *credibility*, *transferability*, *dependability* and *confirmability*, established by leading qualitative scholars, Lincoln and Guba (1985), has long been a widely accepted standard among qualitative researchers for establishing the trustworthiness of a qualitative study. The concept of trustworthiness encompassed rigor in the research process, that is, the research was conducted systematically and to a high standard with integrity and competence (Baillie, 2015, p. 36). Each criterion, with specific techniques useful

for this study and which dovetailed into each other, was used to evaluate the trustworthiness of this case study.

**Credibility.** Credibility refers to how confidence in the findings can be established (Lincoln & Guba, 1985, pp. 296, 301). In other words, Tracy (2010) emphasized the research findings should be plausible, persuasive, and reliable (pp. 842–843). The major techniques to establish the credibility of the study were prolonged engagement, triangulation, peer debriefing, and member checking.

**Prolonged engagement.** Prolonged engagement in the field was developing sufficient familiarity with the context to appreciate the culture, that is, to understand the multiple influences that impinge upon the phenomenon being studied (Lincoln & Guba, 1985, pp. 301–304). The documentary and interview data were collected over a period of eight months. Prolonged engagement, as relevant to this study, was that I was able to engage with the variety of documentary sources appreciating the ecclesial, historical, and sociocultural context in which they were produced. Also, I quickly established trust and rapport with the research participants. This prolonged engagement in the field enabled me to monitor my own developing perceptions and thoughts and to detect and account for any perceived anomalies or distortions in the data, based on my own subjectivities, or those in the documents or of the research participants.

**Triangulation.** Triangulation, that is, the use of multiple data sources and collection methods, was another strategy employed to establish the credibility of this study (Lincoln & Guba, 1985, pp. 305–307). Data for this study were collected from a variety of documentary sources and interviews. The data were not only compared for consistency and similarities but also for differences. Comparative analysis of the interview data augmented and corroborated the documentary data. The internal consistency of the various data sources and the convergence and corroboration of the data contributed to the credibility of the findings and reduced the impact of the researcher's potential biases (Bowen, 2009, p. 28; McCulloch & Richardson, 2000, p. 28).

**Peer debriefing.** Peer debriefing involved exposing oneself to a relatively objective but knowledgeable peer who supported, and also, challenged the researcher. In this study, peer debriefing involved discussing many aspects of my research in an ongoing manner with several individuals who I confidentially consulted and asked for critical and constructive feedback. Several individuals also read drafts of the dissertation or portions of it. Given my personal

background as a lifelong Roman Catholic and experiences in the Church, especially in the parish milieu, and my educational and professional background, I was very conscious this may influence the collection, analysis, and interpretation of the data. Peer debriefing helped me address and counteract my potential biases, perspectives, and assumptions, conscious or unconscious, especially once I started collecting, analyzing, and interpreting data (Lincoln & Guba, 1985, pp. 308–309).

**Member checking.** Lincoln and Guba (1985) stated member checking was “the most crucial technique for establishing credibility” (p. 314). All the interviews were transcribed verbatim and then sent to each research participants for member checking to check the accuracy and completeness of their statement (Lincoln & Guba, 1985, pp. 314–316). Each research participant reviewed the transcript of their interview, and then signed the Transcript Release Form (see Appendix F).

**Transferability.** Transferability refers to the extent that the findings may have applicability in similar situations or be transferred to other settings or contexts (Baillie, 2015, p. 37; Lincoln & Guba, 1985, p. 316). A thick or “rich description can help readers decide whether the research is transferable to their setting” (Baillie, 2015, p. 41). Although this study was not an on-site study in the traditional sense, through the documentary sources and interviews, a thick description, that is, the relevant background knowledge of the historical and current Canadian ecclesial context with respect to training and developing adult religious educators and leaders for the parish milieu was provided in Chapter Four in the presentation of the findings.

**Dependability.** Dependability demonstrates the findings were consistent and if the study was repeated in the same or a similar context, the findings would be replicated (Lincoln & Guba, 1985, pp. 218–219, 298–299). Along with triangulation as discussed above, developing and maintaining an audit trail was a key strategy to establish dependability (Lincoln & Guba, 1985, pp. 283–284).

From the outset of the study, the audit trail involved keeping a running and accurate detailed account of the research process so that every step could be traced back and the rationale underlying the decisions made throughout the entire research process could be explained (Baillie, 2015, p. 41; Lincoln & Guba, 1985, pp. 319–320). The audit trail was supported by writing memos which were designated as operational memos (Birks et al., 2008, p. 73). The very

detailed operational memos for this study contained notes, comments, concepts, ideas, insights, musings, potential code choices and categories, questions, and preliminary interpretation of the data.

The purpose of the audit trail was to document all activities and tasks related to the research process to ensure the study was competently conducted, following what is generally accepted as best practices in qualitative case study research. This study involved making a multitude of decisions from its initial design to the final stages, and especially regarding the collection, analysis, and interpretation of the data. Memoing was a very helpful strategy to capture emerging patterns and themes found in the data which helped in presenting, interpreting, and discussing the findings.

Based on my practice of writing operational memos, the audit trail included records of meetings with my supervisor regarding questions, concerns, and challenges during all phases of the study which were critical to assess if the study was being conducted competently. These operational memos were useful in two ways. First, they formed the basis of ongoing discussions primarily with my supervisor, and also, with other faculty and colleagues regarding questions, concerns, and challenges that arose as I conducted the research. Second, I recorded the advice, insights, and suggestions that I received from my supervisor and these other persons which in turn formed the basis for ongoing discussions with them about various aspects of the study as I progressed.

**Confirmability.** Confirmability refers to the extent the findings of a study would not be shaped by the research participants and the context, or from the researcher's biases, motivations, or interests (Lincoln & Guba, 1985, pp. 218–219, 299–300). Lincoln & Guba (1985) recommended keeping a reflexive journal, “a kind of diary in which the investigator on a daily basis, or as needed, records a variety of information about *self* (hence, the term reflexive) and *method*” (p. 327). Parallel to and concurrent with the audit trail, I kept a personal reflexive journal to actively and systematically engage in critical self-reflection to help control the intrusion of my assumption, biases, perspectives, and suppositions. As a qualitative researcher, I was very aware and conscious that my subjectivity could influence many aspects of the study from planning it to the collection, analysis, and interpretation of the data.

Like the audit trail, the reflexive journal was supported by writing memos which were designated as personal memos to differentiate them from the operational memos because they



were associated with the affective element (Birks et al., 2008, p. 73). As a form of journaling, these personal memos were a mechanism that helped me recognize, articulate, understand, and reflect upon my assumptions, beliefs, reactions, preconceptions, thoughts, and feelings that arose in planning and conducting the study. Also, although this study was clearly situated in the academic discipline of educational administration and leadership, given the multidimensional and multidisciplinary nature of adult religious education, I engaged with diverse disciplinary perspectives including Catholic theology, adult education, and the social sciences in the process of conducting this study. I inevitably brought my relevant previous academic work and personal experience to this study. Given the very high degree of personal judgment involved in collecting and coding the data, the subsequent organization of the coded data into categories, and then into the major themes, the memos in my reflexive journal were useful in managing my subjectivity and helped me to clarify my own thinking, especially in the analysis and interpretation of the data.

Both the audit trail and the reflexive journal were supported by memoing. Even though the audit trail and reflexive journal each had a distinct purpose and content, to a certain degree, they overlapped and even more so as the study progressed and the memos became increasingly more analytical. Through keeping an audit trail and reflexive journal, I wanted to ensure that the study was conducted competently and with integrity, and in the end, data existed that supported my interpretations, and at the same time ensure my analyses and interpretations were consistent with the data I had collected (Guba, 1981, p. 88).

### **Ethical Considerations**

Undertaking research through reviewing documentary sources was not without ethical considerations. Tesar (2015) challenged the perception that archives were ethically neutral research spaces that did not have ethical implications in conducting archival research. Archival research may uncover sensitive data or matters in the history of an institution, that once uncovered, may have ramifications. Therefore ethical considerations were relevant to archival research. Technically speaking this educational historiography was not based on archival research but Tesar's (2015) discussion about ethics in archival research was applicable to this study.

Even though this was a historiographical case study, the 1983 to 2011 period was the recent past, historically speaking. The names of individuals, either deceased or living, may have

appeared in the documentary sources with respect to their role in the adult religious education enterprise in the Canadian Catholic context. In effect, a power differential existed between these individuals and myself because I was not involved in a reciprocal relationship in which the imbalance of power was counteracted, and they were subject to my analysis and interpretation of the data without having given their free and informed consent to be a research participant in the study as I engaged with the data from the documentary sources. It was simply impossible to know all the factors that may have impacted adult religious education efforts in any particular context or endeavor. I needed to ask what was *not* written. Therefore, it was important the data be treated with value and respect.

Whether deceased or living, these individuals may have surviving or existing relatives, colleagues, and friends. The fundamental ethical principle for research involving humans was to protect them from any possible harm. Therefore, I undertook this case study in a manner that was respectful of individuals' dignity and their past contributions to the adult religious education enterprise in the Canadian Catholic context, not minimizing or simplifying what was done. I strove to be fair-minded in the collection, analysis and interpretation of data, and avoided unfairly or negatively affecting an individual's personal reputation, whether deceased or living.

This study involved human participation. Therefore, this study was conducted with respect for the research participants based on the principles of the *Tri-Council Policy Statement on Ethical Conduct for Research Involving Humans*. The study was formally reviewed and approved on ethical grounds by the University of Saskatchewan Behavioural Research Ethics Board.

### **Chapter Summary**

Chapter Three provided an overview of the research methodology and design used in this study. The constructivist paradigm, educational historiography, and case study research was elaborated in the first section of Chapter Three. This section was followed by an explication of the research methods regarding data sources, data collection and analysis, and a discussion of how the trustworthiness of the study was established. Chapter Three concluded with an overview of ethical considerations pertinent to the study.

Chapter Four presents and preliminarily analyzes the documentary and interview data.

## **CHAPTER FOUR**

### **PRESENTATION OF DATA**

Chapter Four begins with a brief description of the data analysis process and how the themes were developed, followed by a general survey of adult religious education activities at the diocesan and parish level throughout Canada during the 1983 to 2011 period. Then Chapter Four presents data regarding approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes undertaken during the 1983 to 2011 period in relation to research questions one and two. Additionally, Chapter Four presents data regarding related challenges and issues which emerged in the data collection process which concludes the presentation of the data. Chapter Five will address research question three regarding how the CoP approach may serve as a tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes within the discussion of the conclusions which arose from the data in relation to research questions one and two.

To remind the reader, the research questions are repeated below:

1. What approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period?
2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

#### **Data Analysis and Development of Themes**

The principal and major source of data were primary and secondary published and secondary unpublished written documents as outlined in Chapter Three (see Appendix A). The data in the documents were reconstituted as primary data to answer research questions one and two. The documentary data were supplemented by data derived from semi-structured interviews conducted with five research participants. It was essential to safeguard the research participants' identity and ensure confidentiality. Therefore, only aggregated data from the interviews were presented. No data was linked to a specific research participant except in one case when

permission was obtained from the research participant to present the data in the section of Chapter Four regarding training adult religious educators and leaders in a parish. Also, no research participant was directly quoted. For the sake of clarity and consistency, the research participants were referred to as *research participants* to differentiate them from other types of participants which arose in the documentary data sources.

To answer research questions one and two, the initial codes were derived inductively from documentary and interview data which included both descriptive and inferential information. These codes were then grouped into categories from which the emergent themes and major themes arose. The themes were defined as “salient characteristic features of the case” (Gall et al., 2007, p. 452). The construction and labelling of the emergent and major themes were determined by the study’s purpose and focus, and the researcher’s prior knowledge of the subject matter, and interpretation of what was seen in the data (Merriam, 2009, pp. 183–185).

### **General Survey of the 1983 to 2011 Period**

Based on a general survey of the documentary sources and the interviews conducted with the five research participants, it was evident there was great interest in adult religious education at the diocesan and parish level throughout Canada during the 1983 to 2011 period. In fact, adult religious education was a major concern and priority in dioceses and parishes across Canada, including Québec. Many different types of gatherings at the diocesan level addressed topics and matters relevant to adult religious education practice.

Numerous dioceses established adult religious education committees and there were efforts to develop a diocesan vision for adult religious education. Individual dioceses sponsored workshops and other efforts to train adult religious educators. An overview of the articles in *Caravan* and *Insight* clearly demonstrated that many individual parishes had adult religious education committees and engaged in a variety of adult religious education efforts. Also, several adult religious education centers were established in Canada to provide a variety of adult religious education opportunities to complement other adult religious education offerings in their particular area.

Canadians involved in adult religious education work in different capacities gathered regularly in different forums at the international, national, and regional levels to address various topics and matters pertaining to adult religious education. At the international level, numerous articles in *Caravan* (see Appendix G) and Devitt (2009) indicated representatives from NORE

attended each of the 10 biennial gatherings of the International Forum on Adult Religious Education between 1988 and 2008 (p. 2). NORE organized four national religious education conferences, all held in Ottawa, ON, in 1987, 1989, 1995, and 2004. The 1987 conference included topics pertinent to adult religious education. The 1989, 1995, and 2004 conferences were explicitly and solely about themes relevant to adult religious education. Regional associations such as the Atlantic Religious Education Association and the Western Conference of Catholic Religious Educators (WCCRE) held annual or biennial conferences. These regional associations demonstrated great interest in adult religious education and topics relevant to adult religious education were part of their conferences.

Given all these activities and interest in adult religious education, and acknowledging there had been progress, an update about Canada at the International Consultation on Adult Religious Education held in 1999, 16 years after the establishment of the adult portfolio within NORE, nevertheless reported, “Canada in many ways is still in the beginning stages of developing adult religious education in the country” (Chafe, 2000a, p. 4).

### **Approaches to Training and Development**

This section of Chapter Four presents data regarding non-formal lay ministry education programs, higher education in religious education, community-based approaches to training and development, and eclectic and fragmented approaches to training and development in relation to research questions one and two.

#### **Non-formal Lay Ministry Education Programs**

Selman, Cooke, Selman, and Dampier (1998) explained non-formal adult education was organized, systematic educational activities offered by educational institutions or other agencies which were intentionally planned to facilitate selected or specific types of learning for particular groups (p. 26). Diocesan lay ministry education programs (hereinafter referred to as LMEPs) and a ministries formation program offered at a Canadian Catholic theological institution were representative of non-formal adult education programs.

**Diocesan lay ministry education programs.** Since the 1980s about 35 diocesan LMEPs were established across Canada (English, 2010, p. 140). English (2010) stated LMEPs were one the most popular non-formal adult religious education initiatives that addressed “the laity’s needs for faith formation, ministerial preparation, and leadership training (all purposes ascribed to some of these programs)” (p. 140). Given the popularity and plethora of these programs what

was salient to this study was to investigate what these programs may have contributed to developing adult religious educators and leaders for Canadian Catholic parishes, given some of the work of adult religious education was conflated with other types of pastoral work and was considered ministry.

Acknowledging there may be unpublished reports and church documents, English et al. (2006) remarked that little attention, if any, had been paid to the effective evaluation of LMEPs, and especially systematic evaluation studies that were in accessible refereed formats (pp. 129–130, 132). Since English et al.'s (2006) utilization focused evaluation study about one LMEP, Kowalchuk's (2015) commissioned evaluation study of another Canadian LMEP was accessible on Google™ Scholar. Thus, along with English's (2002) study about LMEPs, there were publicly available evaluations of two Canadian LMEPs (English et al., 2006; Kowalchuk, 2015).

The Association of Ministries Programs, an association of diocesan LMEP directors from across Canada, met annually to share and compare visions and approaches, and problems and solutions (McMillan, 1991, p. 72). Each Canadian diocese assessed its own needs and capabilities to provide a LMEP, thus there were different approaches and models (McMillan, 1991, p. 72). Many of these programs were offered eight to ten weekends each year over two or three years. There was not a one-size-fits-all approach and model.

English et al. (2006) indicated that the variety of names ascribed to the Canadian LMEPs reflected considerable confusion about the intended purpose and outcomes of these programs, and any corresponding expectations, whether they were for personal religious growth, to provide training for lay ministry, or to provide leadership training (p. 133). Two research participants also indicated there were conflicting ideas about the purpose of LMEPs with respect to their purpose and outcomes. One research participant suggested diocesan offices should invest in helping parishes offer more robust opportunities for adult religious education in the parish rather than offering a diocesan-based LMEP. Two research participants stated the purpose of LMEPs was not to provide training for various forms of ministry in the parish.

In a 2000 survey completed by 23 directors of Roman Catholic programs, only two (9%) of them felt the purpose of their program was clear (English, 2002, p. 22; English et al., 2006, p. 133). Or to put it another way, 21 (91%) of these directors felt the purpose of their program was unclear (English, 2002, p. 22). A relatively recent snapshot comparison of several Canadian

LMEPs indicated the major focus of LMEPs was on personal religious growth rather than on training for forms of ministry (Kowalchuk, 2015, pp. 21–22). However, English et al.'s (2006) and Kowalchuk's (2015) findings demonstrated participants enrolled for both personal religious growth and the possibility to obtain training to engage in some form of ministry. English et al. (2006) reported participants enrolled not only for personal religious growth but most participants enrolled expecting to have a meaningful role in their parish and "most wanted to be in a stronger position of leadership" (p. 139). Kowalchuk's (2015) findings indicated 80% of participants enrolled in the program "to develop skills and working knowledge which will be useful in specific areas of service in the parish" (p. 27).

**Newman Theological College Ministries Formation Program.** Another type of non-formal LMEP not offered by a diocese but a Canadian theological institution was the Ministries Formation Program (MFP) offered by Newman Theological College (NTC) in Edmonton, AB. The MFP was suspended in 1989 to conduct a program evaluation (Hebert, McKeon, & Weckend, 1991, p. 86). Hebert et al. (1991) subsequently published a paper about the MFP's program evaluation.

The MFP began because the bishops and the superiors of major religious orders in Western Canada were concerned lay people receive adequate training to engage in ministry. NTC was an institution which provided academic programs in Catholic theology. The MFP was designed to train lay people, including Indigenous Canadians, to engage in ministry (Hebert et al., 1991, pp. 86, 91). However, participating in the MFP did "not necessarily imply a qualification for a particular ministry or for paid employment" (Hebert et al., 1991, p. 86). Following an evaluation of the initial eight-month offering of the MFP in 1980–1981, the MFP was extended to a full-time 10-month program. The MFP had been provided to seven cohorts each year from September 1982 to June 1989. The integrated components of the MFP included subjects from theology, scripture studies, pastoral skills development, and a supervised practicum. The participants considered the supervised practicum one of the most valuable parts of the MFP (Hebert et al., 1991, pp. 90–91).

The underlying idea of the MFP was each participant came to the program with unique gifts, life experiences, and knowledge. A key idea of the MFP was that learning occurred within the context of a community which provided a milieu of support and challenge and an opportunity to encounter people with different stories and backgrounds. Even though individuals had many

different reasons for entering the MFP, interestingly, many participants entered this program at an older age and in the midst of a career change. For example, some participants had taken early retirement and were seeking new challenges. Also, interestingly of the 106 participants, 81 (76%) were women. For the participants, being in a supportive community was important for learning.

The MFP indicated it was providing basic formation for ministry but it was not providing a qualification or credential for a particular ministry or paid employment in the Church (Hebert et al., 1991, p. 86). However, many participants desired such employment (Hebert et al., 1991, p. 92). Also, graduates of the MFP who became engaged in ministry activities indicated the need for continuing education (Hebert et al., 1991, p. 93).

**Summary analysis of non-formal lay ministry education programs.** Diocesan LMEPs and the MFP offered by NTC were representative of non-formal adult education programs. Generally speaking, there was confusion about the purpose and outcomes of the diocesan LMEPs and the MFP. Both providers and participants appeared to have different understandings and expectations regarding the purpose and outcomes of these programs. Similar to the diocesan LMEPs, concerns were raised about the ambiguity around the purpose of the MFP with respect to qualifications for employment in the Church. Also, the lack of clarity about the purpose of the MFP was reflected when the concern was raised whether the Church was willing to support the MFP's broad vision of ministry which appeared to focus more on personal goals rather than institutional Church needs, especially at a time when the Church's institutional needs were critical due to the declining number of priests and religious women (Hebert et al., 1991, p. 92).

Also, other stakeholders may have been unsure about the purpose of LMEPs. Even though research findings indicated participants derived personal and spiritual benefits from participating in a LMEP, the lack of clarity about the purpose of LMEPs was evident among clergy, ranging from reticence to involve LMEP graduates in parishes to priests questioning the support of LMEPs if participants were not expected to put their education to use in the parish (English et al., 2006, pp. 138–140; Kowalchuk, 2015, pp. 30, 34). To illustrate, in a diocesan survey sent to 95 priests, only eight (8%) priests, all who supported the LMEP, responded (Kowalchuk, 2015, pp. 5, 26). This raised the question of why the other 87 (92%) priests did not respond. Did the lack of responses suggest the priests were unsure of the purpose of the LMEP



or, for unknown reasons, they did not support the LMEP?

Dioceses and minimal student fees mainly supported the diocesan LMEPs (English, 2010, p. 140). In Canada considerable financial, human, and other resources were invested in offering these programs (English, 2010, pp. 140, 144; English et al., 2006, p. 132) but it was unclear what the return was on the investment. One Canadian diocese explicitly expected participants in its LMEP to engage in some form of service. This diocese provided funding “for people active (or who plan to be active) in parishes, schools or other ministries in the diocese” (Lewis Jamin, 2004, p. 8). With the understanding this education was to be shared with others in the diocese, when applications for funding were reviewed, consideration was given to “how many people will benefit either directly or indirectly through the funding” (Lewis Jamin 2004, p. 8). Kowalchuk (2015) indicated the costs for LMEPs would likely increase by 15% to 25% (p. 35).

According to the evaluation, the MFP itself was considered a valuable program but the evaluation raised a number of concerns and questions within the context of an academic theological institution (Hebert et al., 1991, p. 92). Questions were raised whether an academic institution “should be involved in ‘lay formation’, or whether this should occur in pastoral centres or parishes” (Hebert et al., 1991, p. 92). The MFP was labor-intensive and expensive because of its goals and methodology. The Church has traditionally devoted significant resources to the education and formation of men studying for the priesthood and women religious, but not laity (Hebert et al., 1992, p. 92). NTC faculty taught in the program and raised the issue if a program such as the MFP was the best use of limited resources that were available at the time for the education of lay persons. Related to the unclear purpose of LMEPs for participants and the significant investment of human and material resources, the purpose of these programs was contested with the discussion partly centered on whether these “initiatives are intended to replace traditional higher education and graduate degrees in theology which are the normal route to leadership in religious groups” (English, 2002; English 2005b).

The curriculum of LMEPs varied but often was a modified version of a Master of Divinity program consisting of courses in scripture, sacraments, ecclesiology, and history (English, 2010, p. 140). According to English (2010), only one of these 35 programs had a course in adult religious education, and most were strong on classical scripture and tradition (p. 140). English (2005b) underscored “issues are raised about the *ad hoc* nature of many these

lay education programs and their providers” (p. 553).

Regarding LMEPs, English (2010) remarked if LMEPs programs were intended to be training for lay ministry, it reflected “a considerable lack of appreciation for the depth of theological education offered and required in formal higher education for ministry” (English, 2010, p. 141). One research participant suggested LMEPs covered many topics but they could not adequately train persons to engage in adult religious education work in the parish milieu. Also, the MFP participants who became engaged in ministry activities indicated the need for continuing education (Hebert et al., 1991, p. 93).

The evaluation of the MFP (Hebert et al., 1991) which was done prior to the studies by English (2002) and English et al. (2006) was a snapshot of some of the concerns English (2002) and English et al. (2006) later raised about LMEPs especially with respect to lack of clarity about the purpose of LMEPs and the significant investment of human and material resources in these programs. In the large picture, English and Tisdell (2010) pointed out, “There is scant systematic research to substantiate their effectiveness or contribution to adult [religious] education” (p. 290). Despite the significant human and material resources invested in Canadian diocesan LMEPs, it was very difficult to assess whether these programs contributed to developing adult religious educators and leaders for Canadian Catholic parishes given the possibility that any evaluation studies which may have been done were held privately. However, Kowalchuk (2015) indicated that generally graduates of one diocesan LMEP worked in various areas related to religious education in the diocese (p. 20).

### **Higher Education in Religious Education**

During the 1983 to 2011 period, based on information gleaned solely from *Caravan*, five Canadian post-secondary institutions offered a variety of academic programs, both at degree and non-degree levels, relevant to the training and development of adult religious educators and leaders, awarding an academic credential upon completion, ranging from the certificate/diploma level to the Master’s level. These may not represent all the academic programs available in Canada relevant to religious education during the 1983 to 2011 period but these programs represented efforts to make relevant higher education opportunities available to non-traditional students.

**Assumption University, Windsor, ON.** The Institute of Pastoral and Educational Ministry, established in 1992, offered a Master’s degree or Certificate in Religious Education

(Paré, 1993, p. 7). The program was designed for religious educators who taught in a variety of settings. The purpose was to provide a solid academic background to improve and develop the necessary skills for educational ministries. The approach focused on adult learning models, shared discussion, and the integration of knowledge in small group environments. The program also took into account previous life experience, training, and the aspirations of its participants.

**Newman Theological College, Edmonton, AB.** In 1999 NTC received a Lilly Endowment “capacity building” grant to implement a pilot project to make the Master of Divinity degree more accessible to lay persons living in western and northern Canada, a region with a vast geography and 18 dioceses (Torchia, 2003, pp. 3–4). The underlying idea of the grant was to build capacity by expanding lay persons’ access to theological education.

The bishops selected participants who had to be available for at least three-and-one-half years of full-time study. The grant paid the students’ tuition and provided a living allowance subsidy for the semesters students were asked to be on-campus. To comply with NTC’s accreditation requirements, students were allowed to take no more than one-third of the courses through distance education. The benefit of taking courses through distance education was students could work from their home dioceses on roughly alternating semesters. However, both students and faculty had mixed success with this unfamiliar learning mode.

One serious challenge was finding candidates who had a previous university or college degree to qualify for admission to the Master of Divinity program. Also, even though the students received funding it did not cover all their additional expenses of going back and forth between Edmonton and their home diocese. Of the original 17 students, five left early in the program due to academic challenges, financial hardship, and a variety of other personal reasons. Of the remaining 12 students, four students chose to transfer to the Master of Theological Studies program which only required two-thirds of the credits of the Master of Divinity program. However, these students lost their funding when they were no longer enrolled in the Master of Divinity program.

**St. Francis Xavier University, Antigonish, NS.** Designed initially to address the needs of the Catholic Church in Atlantic Canada, the distance education Diploma in Ministry program was established in 1996 (Kucey, 1996, pp. 14–15). At the time, this distance education program was a particularly unique initiative to make theological education accessible to all Canadians in comparison to traditional on-site programs (English, 1999d, p. 61). The program eventually

included participants from Ontario, Western Canada, and the Northwest Territories (Kucey, 1997, p. 11).

Incorporating the principles of adult education practice, each course lasted 12 weeks, and if pursued without interruption, the program could be completed in two-and-one-half years. The Diploma in Ministry was awarded upon completion of the three required courses, Ministry in the Christian Community, Adult Religious Education, and the Practicum, and any two elective courses of Biblical Foundations, God and the Christian Tradition, Contemporary Catholic Issues, or Self-Directed Study. Although participants studied independently, this distance education program provided extra support by having local advisors available to meet with students individually or periodically as a group. Beginning in 2014, the St. Francis Xavier University Diploma in Ministry Program was phased out and ended June 2016.

**Saint Paul University, Ottawa, ON.** The Master in Religious Education degree, offered by the Faculty of Theology, was a professional program designed for teachers which included two practicums, and began in the mid-1990s (Green, 1994, p. 3). The program was designed to be taken on a part-time basis over a three-year cycle, and also employed distance education technology. Off-campus participants in northern and eastern Ontario could complete all the program requirements without ever having to leave their home community.

A national program to offer training in religious education, the Summer Institute in Religious Education (SIRE), also offered by the Faculty of Theology, was designed and implemented beginning in 1999 (Martin, 2003, p. 11). Although students took summer courses in Ottawa, it was unclear if any courses could be taken via distance education but it was implicit the majority of courses were taken on-site in Ottawa during the summer months as “daily prayer and community activities are central to SIRE” (Martin, 2003, p. 11). The Pastoral Certificate in Religious Education was awarded upon completion. As of 2003, close to 100 persons had taken courses and 13 persons had been awarded the Pastoral Certificate in Religious Education. Saint Paul University announced the closure of SIRE in 2016.

**University of St. Michael's College, Toronto, ON.** The Diploma in Theology or Diploma in Christian Education was offered by the Faculty of Theology on a part-time basis at a satellite location in Niagara Falls to people of the Diocese of St. Catharines (Lay, 1987, p. 8). This program had the potential to prepare people for parish-based religious education work, even though the announcement of the satellite program did not explicitly state so. No details were

provided but a practicum was part of the program. The idea was to make theological education available within a reasonable driving distance and at a convenient time for those unable to go to Toronto for work, family, or personal reasons.

**Summary analysis of higher education in religious education.** Three of the higher education institutions were located in Ontario, one in Atlantic Canada, and one in western Canada. Whether through distance education, or an institution offering face-to-face courses at a nearby location, or a combination of distance education and on-site course, attempts were made to make theological education more accessible to academically qualified people who did not reside in the city where the institution was located. Although there were efforts to make higher education in Catholic theology and religious education more accessible, there were still significant barriers and challenges for non-traditional students to acquire and complete higher education in religious education or Catholic theology for any number of reasons or a combination of factors such as lack of academic qualifications, learning difficulties, financial limitations, travel expenses, and geographical location.

Even for someone who wished to pursue a traditional full-time on-site program in religious education or Catholic theology, one research participant raised two significant issues which needed to be carefully considered with respect to pursuing such an education and eventual employment in a parish. First, given the unlikelihood of a diocese providing any substantial financial support, someone would personally bear the financial cost of obtaining such an education, which was compounded if they had to move to another city. Second, generally speaking, someone who did acquire such education likely faced a very uncertain future with respect to secure and stable employment in a parish, and relatedly a just and fair living wage especially if this employment was considered a conventional full-time profession. Very few parishes can afford to hire someone and pay them a living wage. Relatedly, two research participants indicated a precarious employment situation may be compounded if the person's livelihood depended on the favor of a particular priest-pastor. A change in pastoral leadership in a parish has resulted in people being dismissed. Therefore, it was difficult to attract people, especially younger people, who may want to consider this type of work as a long-term career.

### **Eclectic and Fragmented Approaches to Training**

Documentary data demonstrated there was a lack, but at the same time, a pressing need for competent adult religious educators and leaders at the parish level over the past three decades

or so (Blanch, 1987, p. 15; CCCB, 1986, pp. 61–62; CCCB, 1993, pp. 55–57; CCCB, 2011, p. 194 (sec. 155)); Goulet, 1992, p. 4). For example, despite being involved in aspects of adult religious education work, religious educators, at their regional gathering, expressed concerns about the lack of background and skills to engage in adult religious education work, and the need for trained leadership in this area (Derdaele, 1995, p. 12). Three research participants suggested the need for competent adult religious educators and leaders is even more urgent given the significant change and renewal being called for in *The Missionary Dynamic of the Parish Today* (CCCB, 2014), especially with respect to developing new approaches to parish-based adult religious education and outreach efforts in contemporary Canadian society. Two research participants indicated some people may bring some relevant transferable professional knowledge and experience to adult religious education work, and may be open to obtaining further training and education, but generally speaking, it was very difficult to find people with the required education and training to engage in adult religious education work in the parish, and training was eclectic and inadequate. One research participant indicated there was a great need for adequately trained and competent personnel who can engage in adult religious work and assume a leadership role in this area of parish life.

Along with the need for more competent personnel, and despite the emergence of non-formal LMEPs, and programs offered by higher education institutions, nonetheless, challenges existed with respect to training and developing adult religious educators and leaders. Chafe (2000b) reported:

Most adults working with adults learn from mentoring and on-the-job training. As a result, most have an eclectic formation and training, built up a little bit here, a little bit there. Many formation activities are skill oriented or are only three or six hours long and no follow-up is taken. (p. 4)

For example, the WCCRE conducted workshops in three western Canadian dioceses (Dunwoody, 1998, pp. 1–2). The workshops were spread over four to five days and focused on skills training especially for lay volunteers engaged in adult religious education work.

The reality was “most learning opportunities for this field in Canada consist of a combination of workshops, seminars, conferences, institutes and self-directed study” (CCCB, 1993, p. 59). The documentary data indicated that a recurring and pressing imperative was the need to significantly improve the training of adult religious educators especially at the parish

level (Blanch, 1987, p. 15; CCCB, 1993, pp. 20, 35, 57; Giguère, 1989, p. 8; Giguère, 2002, p. 10; Goulet, 1992, p. 4; Jamieson, 1989, p. 2; Lavoie, 1992, p. 7; Van Tighem, 1990, p. 3). Relatedly, leadership development in adult religious education was specifically mentioned several times (CCCB, 1993, pp. 20, 35; Goulet, 1992, p. 4; Jamieson, 1989, p. 2; Lavoie, 1992, p. 7). Gregoire (1987) indicated it was preferable to provide this training within the local parish (pp. 14, 16). Also, opportunities for collaboration and networking among adult religious educators was desirable (Lavoie, 1992, p. 7; Van Tighem, 1990, p. 3).

These challenges were compounded by the lack of structures to provide specialized initial and ongoing training in this field, including leadership development. Relatedly, another significant challenge was the lack of qualified personnel and specialists to provide this training despite that over the years there were discussions about the pressing need for training adult religious educators and leaders and efforts to establish training programs in Canada (Biyne, 1995, p. 7; CCCB, 2011, p. 206 (sec. 167); Giguère, 2002, p. 10; IFARE, 1995, p. 55). In the past, a survey of Canadian theological institutions, colleges, and universities revealed education for adult religious education work was dealt with implicitly or on an ad hoc basis, and often was marginal in the whole education process (CCCB, 1993, p. 27; Chafe, 1990, p. 11; Chafe, 2000b, p. 4).

The consequences of the lack of structures and specialized personnel to provide training and leadership development were the training of people who engaged in parish-based adult religious education work was eclectic and fragmented as represented in the experience of lay people who worked in the parish milieu. Over the past several decades, a new category of worker has emerged in the parish context. Whether full- or part-time, paid or voluntary service, lay ecclesial ministers were recognized as having an official or public role in pastoral ministry. Adult religious educators were included within this category of parish worker. Salient to this study were lay ecclesial ministers' accounts of eclectic and fragmented training and their desire for more continuing education.

In 2002, a study was undertaken to explore lay ecclesial ministry in Canada (Rompré & Peacock, 2004). Acknowledging the Canadian far north was not sufficiently represented in the sample, 10 focus groups were conducted in nine different locations across Canada representing all of Canada's regions and different contexts, both urban and rural, Anglophone and Francophone (Rompré & Peacock, 2004, pp. 3–4). In Canada, there were a great variety of

position titles for lay ecclesial ministers (Rompré & Peacock, 2004, pp. 7, 32). The study revealed diverse aspects of adult religious education work were represented within the major responsibilities of lay ecclesial ministers and also implicitly within particular position titles (Rompré & Peacock, 2004, p. 8). Given the study significantly represented the Canadian experience (Rompré & Peacock, 2004, pp. 6–7), some of the study’s findings were pertinent to this study.

A total of 136 participants participated in the focus groups; 102 were Anglophones and 34 were Francophones. Significantly, 109 women participated in the study, comprising 80% of the participants. The majority (58%) of the participants were engaged in parish level ministry. Diocesan level coordinators of ministry comprised 25% of the participants. Therefore, 83% of the participants directly or indirectly represented pastoral work, including adult religious education, undertaken in parishes. It was worth noting 19% of the participants provided voluntary service and 81% of the participants had paid positions.

Most participants indicated multiple sources for their training including relevant undergraduate and graduate level university education, different types of certificate programs, and other types of non-formal learning programs where they acquired the knowledge and competencies to engage in their work (Rompré & Peacock, 2004, p. 9). Also, 27 (20%) participants indicated the importance of life and work experience in preparation for their ministry (Rompré & Peacock, 2004, p. 9).

Significantly, following the need for ongoing spiritual formation, “the second most important need and priority identified was **ongoing educational opportunities**” (Rompré & Peacock, 2004, p. 24) which was expressed in different ways. For example, “one group desired ‘training’ which included ‘short-term, long-term, ongoing and modular’ options. Other groups wanted . . . ‘more local educational and formation opportunities’, or ‘ongoing education and training’ which was ‘holistic and integrated’ and ‘included theology, spiritual formation and pastoral skills’” (Rompré & Peacock, 2004, p. 24).

**Summary analysis of eclectic and fragmented approaches to training.** Along with the lack of adult religious educators and leaders, the lack of structures and specialized personnel to provide high quality initial and ongoing training in adult religious education practice and leadership were recurring themes during the 1983 to 2011 period. Consequently, there was not a holistic integrated systematic approach to training and developing adult religious educators and



leaders. Considering the lack of background in adult religious education and the eclectic and fragmented training and background of many people who engaged in different aspects of adult religious education work in the parish milieu, it needs to be asked how this may have impacted the quality of adult religious education and learning in the parish milieu.

### **Community-Based Approaches to Training and Development**

Additional to answering research question one and related to research question two, data is presented regarding community-based approaches to facilitate the training and development of adult religious educators and leaders for parishes in three unique contexts. The training of Inuit lay leaders, a diocesan approved initiative to support the training of adult religious educators and leaders for its parishes, and the training of informal adult religious educators and leaders in one parish exhibited situated, contextual, and relational learning which were characteristic of the CoP approach.

**Training Inuit lay leaders.** As the multi-volume *Final Report* of Truth and Reconciliation Commission of Canada (TRC, 2015a) revealed, the history of the relationship between the Catholic Church and Canada's Indigenous Peoples has been a troubled one. Many efforts have been made to engage with the difficult history of this relationship by redressing wrongs, fostering reconciliation, strengthening relationships between the Church and Canada's Indigenous Peoples, and responding to the Truth and Reconciliation Commission's *Calls to Action* (CCCB, n.d.b; CCCB, 2016a; CCCB, 2016c; TRC, 2015b).

Despite this history, many persons of Indigenous ancestry are devout and committed Catholics. Approximately 36 per cent of Indigenous Canadians identify as Catholic (Statistics Canada, 2013). Given the presence of Indigenous Peoples in the Canadian Catholic Church, the Church in Canada has attempted to integrate traditional Indigenous spirituality and cultural traditions within the Catholic faith (CCCB, n.d.a). To be responsive to the needs of Indigenous communities, the Canadian Catholic Church has encouraged and supported the development of Indigenous leaders in Catholic faith communities, not only currently, but also historically (CCCB, n.d.a; Gyapong, 2015a, p. 4).

Non-Indigenous Catholic missionaries have long worked among Canada's Indigenous communities in the far north and other areas across Canada (Kennedy, 2008). Taking into consideration the culture, values, and lifestyle of an Indigenous community, innovative initiatives were undertaken to train and develop Indigenous lay persons to enable and equip them

to assume leadership roles and carry out various ministries, including religious education in their faith communities. In particular, the Missionary Oblates of Mary Immaculate (hereinafter referred to as the Oblates), a Roman Catholic male religious order which had worked among the Indigenous Peoples of Canada since the 1840s, especially in the Canadian far north and west, undertook initiatives to train Indigenous lay leaders (Crosby, 1991).

Lavoie (1991) presented an overview of the various initiatives the Oblates undertook to train leaders among the Indigenous Peoples for Indigenous Catholic faith communities in Alberta, Saskatchewan, Manitoba, Ontario, Québec, and Nunavut. This ministry training included training to engage in adult religious education. Lavoie (1991) outlined key learnings with respect to training and developing Indigenous lay leaders, especially with respect to the importance of relationships, community, mutual respect, and experiential learning (pp. 52–56). An overview of an innovative Oblate initiative to train Inuit lay leaders for Catholic faith communities undertaken in the Diocese of Churchill-Hudson Bay was representative of the Oblates' work among Canada's Indigenous Peoples.

The Diocese of Churchill-Hudson Bay was geographically large with a small Catholic population of mainly Inuit persons who followed their traditional nomadic lifestyle moving around the fishing and hunting grounds according to the seasons until the 1960s when the South made its way into the North, deeply transforming the way of life in the communities (Meeus, 1988, p. 70). These changes also affected the Catholic Church in the Canadian far north.

Missionary clergy working in Churchill-Hudson Bay Diocese felt there was a need to give lay people more responsibility as leaders in the local Catholic community but it was necessary for future leaders to have adequate training. It was decided to train “catechist families” to provide leadership and inspiration for northern communities (Meeus, 1988, p. 70). The program started in 1969. At the time the article by Meeus (1988) was published, the program had existed for 20 years, thus falling within the 1983 to 2011 time frame of this study. As many things had changed over 20 years in the North, the South, in the communities, in the Church, and in the catechist families, the program was being reassessed and updated.

There was a need for a training center where candidates could stay for a certain period of time and receive this training in their own environment. A training center was built in Kugaaruk (formerly Pelly Bay), Nunavut. Three duplexes were built to accommodate the first cohort of six families. It was a two-year live-in program. There was time for participants to go hunting and

fishing because they were still dependent on these activities to feed themselves. Four priests formed the core group in charge of training. The program was both academic and practical, and the catechist families implicitly received training in different dimensions of adult religious education practice (Meeus, 1988, p. 70). After completion of the two-year program in 1971, the six families served in five different communities in the Diocese of Churchill-Hudson Bay.

After a year, the program resumed with a few other families. However, following an initial evaluation, the program was reduced to one year. It was also decided to bring the program to the community where the families lived, letting the resource people bring their expertise instead of centralizing it in one community. Beginning in 1975, the catechist families gathered together annually to receive continuing education. The purpose of the annual gathering was not only for further instruction but was a time of sharing and living together. Along with formal instruction on various religious education themes, what was even more important, was the informal sharing and close contact with the Bishop and with one another. They had opportunities to share experiences they had during the year. Questions and problems were also discussed with the Bishop. The group engaged in an evaluation of past efforts and plans for the future. What was key to this annual gathering was the emphasis on being a community.

The annual gathering was very beneficial not only for the catechist families but also for the missionary clergy. The learning was not a one-way street, where one side was giving and the other receiving. Everyone had valuable gifts to share with one another. By sharing experiences and relationships, questioning and searching, they helped each other learn and grow. Even though the clergy was well-educated in theology and philosophy, the catechist families brought them back to the here and now where the Christian life was lived (Meeus, 1988, p. 73).

**Training and development through an institute.** St. Joseph's Institute of Faith Development was founded in 1997 by the Sisters of St. Joseph of Hamilton and their Companions (lay associates of the religious order) (Holmes, 1999, pp. 6–7, 15). After consultations with stakeholders and spending several months developing the program, St. Joseph's offered a 30-week Certificate Programme in Faith Development Facilitation (hereinafter referred to as the Programme) to interested lay parishioners in Hamilton, ON. Holmes (1999) explained:

The programme's mission was to build upon the existing skill and knowledge-base of its 18 lay participants and to train and empower them to become effective, competent and

self-aware Faith Development Facilitators who would be ready to take on the challenges of facilitating adult faith education programmes in the parishes of the Diocese of Hamilton. To ensure that the participants' training and gifts would be put to good use upon graduation, each participant was sponsored by a parish in the Diocese of Hamilton with the understanding that volunteer ministry work would be available for them in their parishes. (pp. 6–7)

The support and partnership of the parishes were vital to the Programme. Over the 30 weekly sessions, the participants learned the theoretical underpinnings of adult religious education and practiced their skills. They planned, developed, and authored faith development sessions which could be implemented in their parishes. The participants worked in groups, learning together. They presented their adult religious education sessions to each other using peer evaluation. Along with this practice, participants received extensive coaching and assessment from the two Programme Co-ordinators. Interspersed throughout their practical work were interactive inputs presented by the Programme Co-ordinators on topics relevant to adult religious education and learning. Most importantly, the participants learned from each other. They formed a spiritual and professional network which continued to nurture them in their parish work after they completed the Programme.

After graduation, the graduates were provided with continuing education and support as they entered into and engaged in adult religious work in their parishes. It was planned to have a monthly theological reflection group when the graduates could discuss their parish work and receive support and feedback about it. At the same time, the Programme Co-ordinators wanted to evaluate the effectiveness of the techniques, methods, and theory practiced and presented in the Programme. It was hoped the Programme graduates would continue to be involved in the Programme as animators, facilitators, and visionaries. It is unknown how long this Certificate Programme existed.

**Training and developing adult religious educators and leaders in a parish.** One Canadian parish, in effect, adopted an approach to train and develop informal adult religious educators and leaders from within the parish to foster a great variety of informal adult religious education and learning processes. The findings in this section were based on an interview with one research participant, a senior member of a parish's pastoral leadership team, and informed by the GDC (CC, 1997), the Church's guiding policy document for adult religious education.

The priest-pastor foundationally regarded the parish as a place for people to experience community, spiritual nourishment, and formation in all dimensions of the Christian life. At its heart, the priest-pastor regarded communicating and teaching the Christian faith a key cornerstone of parish life. Adult religious education was seen as a lifelong apprenticeship in the Christian life and as a holistic and integrated process, from initiation in the Christian faith to ongoing religious education, to foster a mature lived faith and full development in the Christian life (CC, 1997, paras. 30, 48, 51, 53–56, 63, 67, 69, 173). Adult religious education was cultivated in all its dimensions through promoting knowledge and the meaning of central Christian tenets along with formation into and within the Christian faith community through participation in its liturgical and sacramental rituals, communal life, and fostering a sense of ownership of and co-responsibility for the Church’s mission (CC, 1997, para. 87).

Recognizing the contemporary sociocultural reality in Canadian society and a very changed Catholic environment, the parish implemented a pastoral model which would genuinely and non-judgmentally welcome and support people regardless of where individuals were at in their own spiritual journey, their struggles, and relationship to the Church. This parish recognized the need to appropriately respond to the spiritual needs of people from very diverse backgrounds and experiences of Catholicism, including those who wished to return to the practice of the Catholic faith. Generous and genuine Christian hospitality, experiences of authentic Christian community, inclusivity, outreach, and a supportive environment were very strong features of this parish’s culture and ethos (CC, 1997, para. 174).

The GDC (CC, 1997) highlighted smaller groups were important because “they promote a sense of dialogue and sharing as well as a sense of Christian co-responsibility [and] apart from its didactic aspect, the Christian group is called to be an experience of community and a form of participation in ecclesial life” (para. 159). One key strategy to facilitate the process of adult religious education in this parish was the establishment of a variety of small and mid-size groups where individuals would experience a sense of belonging and community in which informal or non-formal adult religious education and learning also occurred. This approach was not a model that focused on programs but rather learning in community. The small groups which focused more on content were provided appropriate adult religious education resources by the parish, but nonetheless, learning in community was central. Catholic informal adult religious education is one way in which adults learn about aspects of the Catholic faith and grow spiritually. Elias

(2012) highlighted:

Experience is at the center of informal education because it is less about cognitive understanding than about participating actively in various settings . . . . These experiences are primarily interactive and group ones. Questions are asked, discussions are stimulated, and learners are engaged. Informal education is effective because it immerses learners in a specific religious culture. (p. 10)

Parishioners and people from the wider community were invited and strongly encouraged to connect with and participate in a variety of these smaller communities which existed within the parish. This parish had a wide range of groups depending on people's needs and interests, stage in their spiritual life, and relationship to the Church. In effect, these groups engaged in a wide range of adult religious education activities and processes that were responsive to adults' particular needs and interests at any stage in their faith journey. These small and mid-size groups became communities within the larger parish community and strengthened the parish's ability to nurture people's growth in Christian discipleship in different ways. In effect, the parish was a community of communities.

What was especially unique in this parish was informal leaders were invited, chosen, and called forth from the community and were provided appropriate training to facilitate the process of adult religious education in the small and mid-size groups. The priest-pastor, as the formal leader of the parish, was committed to the Second Vatican Council vision of lay people being actively co-responsible for the Church's mission, not merely being co-laborers. This priest-pastor was solidly committed to collaborative leadership and delegated various leadership responsibilities to the competent members of the parish's leadership team, some of whom were responsible for overseeing and training informal leaders to empower and equip them to engage in various aspects of adult religious education work. These informal leaders were equipped with the appropriate competencies for their context and role which were aligned with the parish's overarching vision, purpose, and core values. This approach to training and developing informal leaders from within the parish community diminished the possibility of the typical approach to adult religious education in a parish in the sense that it was not a program done by the priest or someone else with a degree in theology or considered an expert. These informal leaders made up the foundation of the parish's approach to fostering these smaller groups and thereby facilitating informal adult religious education and learning in many different ways.

All the informal leaders essentially received the same training, and also had the potential to assume more advanced informal leadership roles in different types of groups after obtaining experience at one level. In fact, it was expected that informal leaders would grow in their leadership capacity. This decentralized approach to adult religious education in the parish and the commitment to training and developing leaders from within the parish community which was not structured in the traditional hierarchical model has greatly benefited the parish. Through the commitment and service of well-trained informal leaders the parish had flourishing and robust adult religious education activities and processes and outreach to the larger community, thereby reaching and engaging a greater number of people in the processes of adult religious education. Along with exercising co-responsibility for the Church's mission through making their specific contributions to the Church's teaching function, in effect, these informal leaders supported not only the priest-pastor's teaching function (CC, 1997, paras. 224–225) but also the teaching function of the diocesan bishop's office (CC, 1997, para. 222).

**Summary analysis of community-based approaches to training.** It should be noted the lay people who were being trained were not professional religious educators. The training in each of these three contexts was a form of apprenticeship and situated learning in their real world contexts through which these lay people acquired the knowledge and skills to engage in various dimensions of adult religious education practice.

Even though each context was unique, these community-based approaches to training provided an alternative pathway for lay people to adequately develop the appropriate competencies for their particular context and role. A key feature was collective and collaborative learning which occurred in small groups. Along with a customized learning and training program provided by experienced and knowledgeable practitioners and clergy, developmental and peer mentorship was implicit in these three contexts. The social fabric of the community fostered peer learning and support.

### **Related Challenges and Concerns**

Based on the documentary and interview data, an unexpected finding, even perplexing one, was the disappointment and dissatisfaction of many lay persons who had participated in various educational programs with respect to applying their knowledge and skills and working in the parish milieu. Lack of opportunities to apply knowledge and skills, the meaning and practice of collaboration, the roles of lay persons and clergy, and clericalism appeared to be the major

issues.

Many participants in LMEPs believed they were being prepared for a more active ministerial and leadership role than they were (English et al., 2006, p. 139) or wanted to be able to use their knowledge and skills in an area of service in the parish (Kowalchuk, 2015, p. 27). Rompré and Peacock's (2004) findings reflected frustration among lay ecclesial ministers with respect to not being accepted and recognized in their ministerial role by clergy or other parishioners (pp. 17–19).

Within the hierarchical governance structure of the Church, a priest is the formal leader of the parish and is responsible for religious education in the parish. The GDC (CC, 1997) outlined the parish priest's obligations and specific tasks for religious education in the parish which implied mature servant leadership (Byron, 2014), collaboration, and collaborative leadership (paras. 224–225). Kowalchuk (2015) reported priests drew on Canon Law to exercise their positional authority when there were conflicts and power struggles (p. 10). The underlying source of tension and conflict, whether explicit or implicit, appeared to be different understandings and expectations regarding the roles of lay persons and clergy in the parish with respect to the division of labor in the Church, and the meaning of collaborative ministry and leadership (Kowalchuk, 2015, p. 10; Kuzmochka, 2014, pp. 144, 207–208, 225–226), and clericalism.

Clericalism, in its various manifestations, individually or corporately, along a continuum from obscure to obvious, as a style of elitist ecclesial leadership, at its core emphasizes the hierarchical and clerical authority structure of the institutional Church, and the positional power and authority of the priest with the expectation of the laity's deference (Kenny, 2012, pp. 65–74; Murphy, 2009, pp. 37–38). In effect, a clericalist mind-set means a top-down and controlling style of leadership inherently susceptible to the abuse of power, and lack of accountability and transparency (Kenny, 2012, pp. 65–74; Murphy, 2009, pp. 37–38). Three research participants especially indicated lack of training in collaboration and collaborative leadership and clericalism were huge issues among clergy.

Three research participants indicated seminarians and priests had not received leadership training. One huge challenge was seminaries generally do not train seminarians in collaborative approaches to leadership, and in fact, more recently, younger priests appeared to be trained in the more traditional, that is, a clericalist model of priesthood. This problem was compounded when



young priests, with very limited life experience, were assigned the pastor of a parish of mature people who have much more and varied life experience. They cannot cope so they may become authoritarian. *On Good Soil* (CCCB, 2011) identified the need for clergy, religious educators, and other pastoral leaders to develop skills for collaboration to engage in adult religious education work (p. 38 (sec. 18)). Earlier, the CCCB's (1993) report of a Canada-wide study about adult religious education reported a major challenge which emerged was collaboration between clergy and laity (p. 48). Many respondents "expressed feelings of tension between clergy and laity; there is a strong desire for more collaboration and understanding" (CCCB, 1993, p. 31). This report also indicated clergy required education and training in adult religious education both at the seminary level and ongoing learning in this field (CCCB, 1993, p. 28).

Two participants indicated it was a skill for priests to engage in collaboration and collaborative leadership, especially with women. Very capable lay women were strong leaders in parishes, and for some priests this was a challenge. Along a continuum of the ability of priests and lay persons, particularly women, to engage collaboratively depended on the personalities, abilities, maturity, and the openness of the individuals involved, and what their understanding of collaboration entailed. The ability and the desire to collaborate and engage in collaborative leadership was very individually based, and any working relationship would have its own style of interaction. The reality was some dedicated and talented women have withdrawn from engagement in parish work due to tensions and conflicts.

Four research participants indicated there was a need for a new vision of ordained priesthood. It was necessary to explore and articulate what the role of the priest was in today's world and in the parish. Although a priest officially was the leader of the parish and pastoral leadership in parishes has traditionally been exercised by priests, it was essential the parish priest was willing to adopt a collaborative leadership style as teamwork is now a necessary element of parish life. All five research participants indicated parish priests have to be willing to embrace and enable collaborative leadership by recognizing and respecting the gifts of the laity and give creative opportunities for those gifts to be expressed within the Church. A similar sentiment was expressed in the CCCB's 1993 report which stated, "An overriding concern was the clergy need to trust and give more reign to the talents and initiatives of lay people" (p. 28). Embracing collaboration and enabling the laity to use their gifts would greatly enrich parish life. However, many priests tended to see pastoral leadership as part of their ministry and did not want lay

people interfering with this role even if there may be qualified lay people who could assume leadership roles in the parish. In fact, some priests may feel threatened by highly educated and well-informed lay persons.

Three research participants indicated the recent influx of foreign priests to serve in Canadian parishes, due to the shortage of domestic priests, has also created challenges with respect to collaboration and collaborative leadership. Even though foreign priests bring their gifts and outside perspectives and serve ethnic and immigrant populations, three research participants indicated there was an excessive dependence on foreign priests to serve Canadian parishes. Many foreign priests serve in an exemplary manner but routinely addressing the shortage of priests by bringing in foreign priests to serve Canadian parishes appeared to preclude talking about developing robust lay leadership in parishes and models of clergy/lay collaboration.

Bringing in foreign priests was a transitory solution to the acute shortage of priests in Canada. Relatedly, foreign priests may have a relatively short-term commitment lasting only several years before returning to their home countries. Also, foreign-trained priests, through no fault of their own, may take significant time to adjust to Canadian culture and norms and become willing to engage in collaboration and collaborative leadership. Like the domestic priests, there was great variation in the abilities and capacities of individual priests to engage in mature servant leadership and collaboration and collaborative leadership.

### **Chapter Summary**

Chapter Four briefly described the data analysis process and how the themes were developed, which was followed by a general survey of adult religious education activities at the diocesan and parish level throughout Canada during the 1983 to 2011 period. Chapter Four then presented documentary and interview data regarding approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes during the 1983 to 2011 period in relation to research questions one and two. These approaches included LMEPs and programs in religious education offered by higher education institutions to non-traditional students, eclectic and fragmented approaches, and community-based approaches in three distinct contexts. Chapter Four also presented data regarding related challenges and issues.

In examining approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes, the documentary and interview data

revealed the magnitude and scope of the personnel and training challenges in this field in Canada. These challenges included the lack of well-prepared adult religious educators and leaders, the need for improved training, leadership development and networking, the lack of structures and specialized personnel to provide training, and the eclectic and fragmented nature of training. A long-standing need was to develop a viable and sustainable approach and plan to train and develop adult religious educators and leaders for Canadian Catholic parishes.

The interview data were intended to supplement data in documents, which were the principal source of data. This data confirmed insights and findings from the documentary data regarding approaches to training and developing adult religious educators and leaders for the parish milieu and the potential benefits of community-based approaches. In fact, it was striking how consistent and confirmatory the interview data were with the themes that emerged from the documentary data, and that there were no outliers. Also, the interview data expanded upon the potential financial challenges of pursuing higher education in Catholic theology or religious education and a precarious employment situation even if someone pursued such an education. The interview data especially emphasized the need to develop robust models of clergy/lay leadership.

Chapter Five discusses the findings and conclusions related to research questions one and two and addresses research question three followed by the discussion and conclusions regarding related challenges and issues and educational historiography. Implications for theory, policy, practice, and further research is then discussed. A personal reflection on the dissertation journey concludes Chapter Five.

## **CHAPTER FIVE**

### **CONCLUSIONS, DISCUSSION, AND IMPLICATIONS**

Beginning with restating the purpose of this study and the research questions, Chapter Five discusses this study's findings and conclusions followed by the discussion regarding related challenges and issues and educational historiography. Implications for theory, policy, practice, and further research is then discussed. A personal reflection on the dissertation journey concludes Chapter Five.

#### **The Purpose of the Study**

The purpose of this educational historiographical instrumental case study was to investigate what approaches to facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period. Drawing on educational scholarship, especially Lave and Wenger's (1991) work on communities of practice (CoPs), the secondary objective of this study was to analyze these past approaches with respect to their key features and processes and investigate if any of these past approaches exhibited the three structural elements of a CoP, domain, community, and practice, and its features of situated, contextual, and relational learning. Relatedly, Otero and Cottrell (2013) specifically explored the CoP framework conceptually as one potential approach to train and develop adult religious educators and leaders for Catholic faith communities, especially parishes, in the Canadian Catholic context. Therefore, an ancillary objective was to consider the extent to which the CoP framework may be an appropriate approach to train and develop adult religious educators and leaders for Canadian Catholic parishes.

#### **Research Questions**

The research questions which guided this study were:

1. What approaches to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes were undertaken during the 1983 to 2011 period?
2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

## **Discussion and Conclusions Regarding Approaches to Training and Development**

This section of Chapter Five discusses the findings and conclusions related to research questions one and two regarding non-formal lay ministry education programs, higher education in religious education, eclectic and fragmented approaches to training, and community-based approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes.

### **Non-formal Lay Ministry Education Programs**

The data showed people enrolled in non-formal LMEPs for mainly two reasons. First, people enrolled in LMEPs for personal religious or spiritual development. Second, many people also enrolled in LMEPs to acquire knowledge and develop skills to engage in some type of church ministry. Along a continuum, these two reasons may have overlapped for persons who enrolled in a LMEP. Kowalchuk (2015) indicated individuals who enrolled in a LMEP were at varying stages with respect to their personal faith, level of knowledge about the Catholic faith, and experiences of Christian service and ministry (p. 19). However, one benefit of LMEPs was that some participants, as they grew in knowledge and deepened their faith and were exposed to opportunities and options for service, eventually entered into some type of Christian service, not only in the parish which sponsored them but often in the wider Church (Kowalchuk, 2015, p. 19). Furthermore, some participants went on to further studies to develop their ministry capabilities (Kowalchuk, 2015, p. 20).

Not to diminish the personal and spiritual benefits of LMEPs for individual participants, there was a lack of concrete data to evaluate the benefits parishes may have received even though parishes may have been asked to sponsor participants in a LMEP. In particular, it cannot be substantiated how LMEPs contributed to the training and development of adult religious educators and leaders for parishes. As previously mentioned, English and Tisdell (2010) pointed out how little research exists to demonstrate the contributions and effectiveness of LMEPs to adult religious education (p. 290). However, although it was not possible to generalize to other LMEPs due to lack of data in the public domain, Kowalchuk's evaluation of one LMEP (2015) indicated the alumni of this particular LMEP were highly engaged in Christian service and ministry within their parishes and the diocese (p. 20).

Generally speaking, the purpose of LMEPs was ambiguous. Perhaps LMEPs were trying to do too much given there seemed to be two distinct reasons why people enrolled in LMEPs.

First, if people enrolled in a LMEP primarily for personal religious or spiritual development, given that the parish should be the primary venue for this type of religious education, it was possible if more robust adult religious education experiences were offered by the parish or a cluster of parishes, this may have met these types of needs. Second, given the plethora of names assigned to lay education programs across Canada, some of which included the term *ministry* (English et al., 2006, p. 133), it may have been confusing for participants given that the data suggested people also enrolled in a LMEP to be trained for some type of church ministry and leadership role even though it was very unclear if the purpose of some LMEPs was to train people for ministry. With this being said, the findings suggested LMEPs could not adequately train people to engage in adult religious education work in the parish.

Given the considerable human and financial resources which were invested in LMEPs, it was reasonable to ask if this was a prudent use of limited human and financial resources. This was a difficult situation. On one hand, persons desired adult religious education for personal religious and spiritual development but it appeared parishes were unable to meet this need. On the other hand, if a parish or cluster of parishes did not have personnel who could competently engage in adult religious work, persons who desired adult religious education for personal religious and spiritual development may have sought alternative opportunities for this type of religious education. To the degree that parishes did not or could not provide adult religious education opportunities, people looked elsewhere to meet their need for religious education.

LMEPs emerged at a time when it was recognized lay people needed more religious education in the aftermath of the Second Vatican Council. It is unknown how many LMEPs are currently active in Canada. However, Kowalchuk (2015) provided a snapshot of the status of LMEPs in western Canada which indicated LMEPs may be inactive, have had various versions of the program, or were being reviewed as to their future direction (pp. 21–22). For example, one western Canadian archdiocesan LMEP has undergone changes which may make the program more relevant and responsive to the contemporary needs of Catholics (Buchok, 2017, p. 6). Kowalchuk's (2015) review of LMEPs in western Canada may depict the general status LMEPs in other parts of Canada.

### **Higher Education in Religious Education**

The GDC (CC, 1997) highlighted the importance of accessibility to higher education in

religious education and a higher level of preparation especially for clergy and lay persons who could be capable of directing adult religious education at the diocesan level or within religious congregations which engage in religious education (para. 251). Also, these higher education institutes should parallel and function as a university with respect to the curriculum, courses, and admission requirements (CC, 1997, para. 251). Although the GDC (CC, 1997) recognized the importance of higher education for the training and development of religious educators and leaders, there are a variety of barriers and challenges to acquiring this type of education in Canada.

**Degree level programs.** A Spring 2017 online survey of currently offered programs in religious education at the undergraduate and post-graduate diploma or Master's level in English-speaking Canada showed programs were offered at six Catholic theological institutions located in Vancouver, Edmonton, Ottawa, and Toronto (see Appendix H). Three of these institutions were located in Toronto. One institution's Master's program could be completed on-site or online. Another Master's program was a combination of distance learning technologies and on-campus intensive sessions (one weekend per term).

Three of these theological institutions, all in Ontario, offered a Doctor of Ministry program in which doctoral level studies in a topic related to adult religious education could possibly be undertaken. Occasionally, a graduate level program in religious education was offered at a satellite location (Yaworski, 2013, p. 6). One undergraduate program in theology indicated it could be suitable for persons interested in working in different ministry areas including religious education but some of these areas will need further formal training. It was worth noting many of these programs had a special focus on religious education and leadership in Catholic K–12 schools. Five of these theological institutions were located in Canadian provinces which have fully publically funded K–12 Catholic schools.

Even though this discussion focused specifically on religious education programs, other types of theology programs, for example, Master of Divinity or Master of Theological Studies, were offered at Canadian Catholic theological institutions. Also, although not directly related to training for adult religious education practice, it should be noted there were a number of undergraduate interdisciplinary Catholic Studies (Topping, 2010), religious studies, and theology programs offered by Canadian universities which are part of the post-secondary landscape that examines Catholicism's philosophical and theological thought, artistic and literary culture, and

role in history and contemporary engagement with global issues.

**Non-degree level programs.** A Spring 2017 online survey indicated eight Canadian theological institutions, six of them Catholic, one ecumenical, and one Anglican which offered a Roman Catholic stream, offered non-degree level on-site or online programs in Catholic Studies, religious education, liturgy, new evangelization, pastoral ministry, or theology leading to a certificate or diploma upon completion (see Appendix I). Even though these programs may provide knowledge relevant to engaging in adult religious education, only one of these theological institutions specifically offered Certificates in Catechesis I and II and Religious Education but these programs did not include a practicum.

Five of the institutions required a high school diploma or equivalent to be admitted to the program or there was the option to apply for mature student status. Three programs did not indicate whether a high school diploma was required. A variety of programs offered by one institution indicated its programs were open to adults of all backgrounds and educational levels. A survey of online information about these programs demonstrated similarities and differences in the curriculum and evaluation criteria to be awarded the credential. For example, upon completion, one program awarded the Diploma in Theology and Ministry *without any exams or assignments* [emphasis added] although there was the option for some written assignments. Participants in this two-year on-site program met 10 weekends (Friday evening and all day Saturday) per year. Another program awarded the Diploma of Theology after completing 60 credit units. One asynchronous online program in religious education required assignments but did not include a practicum.

**Barriers and challenges to acquiring higher education in religious education.** The data analysis revealed that there are a variety of barriers and challenges for non-traditional students to acquire degree level or non-degree level education in Canada in religious education. In a country as geographically large as Canada, unless someone lives in one of the major urban centers which has a theological institution, there may be challenges in acquiring a high quality theological education experience, especially at the degree level. Even though online education may make theological education more accessible and affordable, learners may not have the advantages of interacting with other learners and faculty, or of mentorship, which characterize traditional on-site theological education programs (Swan, 2016, p. 13). It is possible to have a combination of online and face-to-face learning but the program must be designed carefully, and



may in fact require more effort from both learners and professors to make it a valuable learning experience (Swan, 2016, p. 13).

Whether for degree level or non-degree level programs in Canadian theological institutions, academic status, family commitments, financial limitations, lack of English proficiency for post-secondary level studies, geographical location, and preferred learning styles are some reasons, or combination of any of these reasons, that these programs may not be accessible or feasible for promising adult religious educators and leaders. Pursuing this type of education and training could be academically challenging for many individuals. Furthermore, along with the many challenges of settling in a new country, based on my past professional experience, consideration must be given to how any of these barriers may be amplified or compounded for newcomers to Canada. Yet, the reality is newcomers are a significant presence in Canadian Catholic parishes and will continue to be so in the foreseeable future. Having to provide proof of English proficiency for post-secondary level studies and where necessary, providing certified English translations of any educational documents relevant to applying for admission to a particular program of studies, and issues dealing with transfer credit evaluation and recognition of studies undertaken at a foreign institution are some of the barriers newcomers may face in their considerations to undertake a program of studies. For example, I am acquainted with a recent immigrant from the Philippines, a lay person, who studied Catholic theology in the Philippines but at this stage in settling in Canada, it simply is not possible to consider undertaking a program of studies in Canada for a variety of reasons. In addition, traditional western models of teaching and learning in higher education institutions may itself even be a barrier for non-traditional students.

People may be unable or not want to leave their homes and communities for long periods of time. The total costs of pursuing a program may be prohibitive for many individuals unless they have access to substantial financial support. Tuition and other costs of a program, relocation and living costs in another city, and given Canada's vast geography, the cost of travelling long distances within Canada, especially from isolated locations, is very expensive. Also, the issues such as flexibility in admission requirements and the curriculum and quality of these educational programs need to be taken into consideration. Furthermore, there is the question of who could provide this type of education in the future in Canada. The CCCB, at its annual plenary assembly in 2016, expressed concern about the challenges facing Canada's

theological institutions with respect to “the declining number of Canadian institutions, professors and students specializing in higher theological studies” (Crosby, 2016, pp. 4–5).

Despite the value of higher education in religious education and Catholic theology with respect to training and developing adult educators and leaders for Canadian Catholic parishes, there are a variety of barriers and challenges to acquiring this type of education in Canada, especially for non-traditional students and students who do not live in one of the major urban centers which has a theological institution.

### **Eclectic and Fragmented Approaches to Training**

*On Good Soil* (CCCB, 2011) indicated, “There are few structures in place in the Church in Canada to form parish, diocesan or eparchial, or national leaders in the field of evangelization and catechesis with adults” (p. 37 (sec. 17)). It also indicated a great need for adult religious educators (p. 194 (sec. 155)). The GDC (CC, 1997) emphasized the need for “truly competent and trained personnel” (para. 234). Thus, people who engage in adult religious education work require some type and level of preparation suitable for their context and role.

*On Good Soil* (CCCB, 2011) encouraged each diocese to assess what current programs were offered for training adult religious educators suggesting the diocese may already have resources which could be more fully organized or the diocese may need to expand its offerings (p. 207 (sec. 168)). Also, *On Good Soil* (CCCB, 2011) suggested possible methods and venues for training such as “self-directed study with a mentor from the community and participating in formal diocesan or eparchial programs, workshops, certificates and advanced-level opportunities” (p. 202 (sec. 163)). However, as valuable as mentorship can be to newcomers, this may be a challenge. This suggestion presumed there was a pool of experienced adult religious educators and leaders in the Canadian context who were capable of and willing to mentor newcomers. This may not be a feasible suggestion for Canadian parishes given the lack of people with expertise in parish-based adult religious education work who could meaningfully mentor newcomers in this work. Diocesan programs and workshops may also provide some training. Advanced level studies, whether degree level or non-degree level, also may not be a feasible option for many individuals as explained earlier in Chapter Five.

Many of *On Good Soil's* (CCCB, 2011) suggestions were undertaken in the 1983 to 2011 period. In the end, it needs to be asked how these training efforts, whether initial or continuing, were any different from the fragmented piecemeal eclectic training of the 1983 to 2011 period.

The findings from the study about lay ecclesial ministers clearly indicated the desire for “ongoing educational opportunities” (Rompré & Peacock, 2004, p. 24). This desire was very commendable as it expressed people’s desire to learn and improve their practice.

*On Good Soil* (CCCB, 2011) suggested “a pooling of ideas, information and teaching aids” (p. 119 (sec. 82)) between various Catholic entities and indicated the potential of partnerships within Canada to address the issue of training adult religious educators and leaders. But it also acknowledged that this requires “a new vision of co-operation and collaboration” (CCCB, 2011, pp. 206–207, (sec. 167)). Except for these suggestions, *On Good Soil* (CCCB, 2011) did not propose any innovative approaches, models, or solutions to facilitate the doctrinal, pedagogical, and leadership training and development of adult religious educators and leaders or how to facilitate co-operative and collaborative partnerships.

Although there was a pressing need for well-prepared adult religious educators and leaders for Canadian Catholic parishes, training for adult religious education work still tended to be eclectic and fragmented given the lack of structures and partnerships to facilitate training and leadership development.

### **Community-Based Approaches to Training and Development**

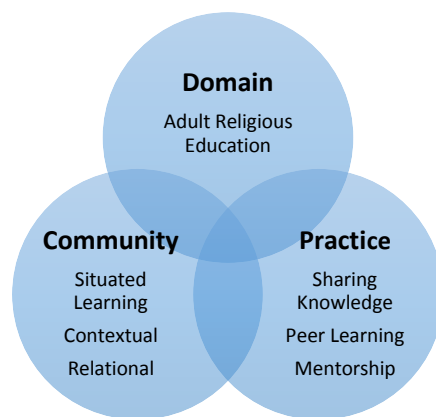
The training of Inuit lay leaders, a diocesan approved initiative to support the training of adult religious educators and leaders, and the training of informal adult religious educators and leaders in one parish represented community-based approaches to facilitate the training and development of adult religious educators and leaders for parishes in three unique contexts. None of these community-based training endeavors saw themselves as practice-based CoPs nor intentionally adopted a CoP approach to facilitate the training and development of adult religious educators and leaders. But for the purpose of this study, these community-based approaches were regarded as de facto CoPs and the people involved were considered as *members*. Based especially on two of a CoP’s structural elements, domain and community, these community-based approaches were considered as de facto CoPs. It was presumed the members shared a common interest in adult religious education practice which was considered the domain. Learning in community and a CoP’s key features of situated, contextual, and relational learning reflected a strong community element in these de facto CoPs. With respect to a CoP’s structural element of practice, the documentary data implied the members were acquiring the knowledge and practicing the skills to develop their competency in various aspects of adult religious

education practice in their particular context. In the subsequent discussion, the analysis and interpretation of these de facto CoPs are framed using CoP concepts.

Related to research question two, and with reference to the literature about CoPs in Chapter Two, these three community-based approaches are analyzed and discussed through the lens of the three structural elements of a CoP: domain, community, and practice. A discussion of the advantages of the CoP approach and barriers to implementing a CoP approach ensues. At the same time, this section incorporates the discussion and conclusions related to research question three. To remind the reader, research questions two and three are repeated below:

2. In what ways did any of these approaches exhibit situated, contextual, and relational learning which are characteristic of a CoP approach?
3. How can the CoP approach best serve as an appropriate tool to facilitate the initial and ongoing training and development of adult religious educators and leaders for Canadian Catholic parishes?

**The community of practice framework.** The three structural elements of a CoP, each with its core features listed pertinent to the training and development of adult religious educators is depicted below (see Figure 5.1).



*Figure 5.1.* CoP approach to training and leadership development.

**Domain.** With respect to adult religious education, the domain, that is, the common concern and interest which brought together the members of these CoPs, was to develop a variety of competencies relevant to engaging in adult religious work in their particular context. This domain created the common ground which brought the members together regularly. Through their contributions and participation, the members demonstrated a commitment to the domain

and engaged in the process of collective and collaborative learning. In particular, the graduates of the St. Joseph's Certificate Programme intended to continue as a CoP which could nurture and support them in their parish work in various ways. As they entered into and engaged in adult religious work in their parishes, they were provided continuing education opportunities and it was planned to have a monthly gathering when the graduates could discuss their parish work and receive support and feedback about it.

**Community.** The nature and quality of the members' interpersonal relationships and interactions within these CoPs appeared to reflect a very high degree of social capital which was the capacity to build quality relationships based on equality, trust, mutual respect, and reciprocity. The community element bound the members together providing them with a sense of belonging, collegiality, and support as they gathered regularly to interact and learn together. These CoPs were highly relational spaces and the community itself created the social fabric of learning.

The training initiative among Inuit lay leaders especially highlighted the element of community because both the Inuit and clergy members were all learners and each member learned from each other on the basis of equality and mutual respect. Non-Indigenous Catholics can learn very valuable lessons about the nature and meaning of authentic community from Indigenous Catholics given the significant priority of relationships and relationality in Indigenous cultures.

**Practice.** Each of these CoPs shared and stewarded the variety of knowledge and resources which enabled the individual CoP to deal with its domain in its particular context. The members of each CoP received customized training which was provided by the experts such as the clergy and other persons with relevant expertise. Like the evening chapels and BMAS, along with learning from the experts, the CoP also facilitated peer-to-peer learning and mentorship.

**Advantages of the community of practice approach.** Even if someone was willing to engage in parish-based adult religious education work, they may be reluctant to do so because they feel unequipped or inadequately prepared and may not have the appropriate opportunities and resources for training, development, and mentorship. A CoP, established within a parish or cluster of smaller parishes, can induct and mentor newcomers to adult religious education work and provide ongoing and altruistic support in their development as adult religious educators,

helping them develop the requisite qualities, competencies, and skill sets. Along with recruiting and retaining adult religious educators and leaders, the advantages of situated, contextual, and relational learning supported by participation in a small group, and the ability of CoPs to exist within the Church's formal structures, suggest the benefits of the CoP approach for training and developing adult religious educators and leaders for the parish milieu.

***Situated, contextual, and relational learning.*** The Church is a unique organizational entity in the sense that it has both global and local dynamics. Although there is significant global unity within the Church in terms of foundational common beliefs and practices, great diversity exists in the local context as to how these are expressed. As the CCCB (2014) pointed out, any individual parish will have its own unique history and organizational context and culture (p. 4 (sec. 6)). Situated, contextual, and relational learning were characteristic features of a CoP approach which may be apt to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes. Relatedly, the GDC (CC, 1997) emphasized the training of religious educators “must be closely related to praxis: one must start with praxis to be able to arrive at praxis” (para. 245).

Even though the Church is a global organization, it is at the local level where adult religious education work is carried out. Informed by the Church's guiding principles for adult religious education policy and practice, the distinct practice of any parish community in its local context is shaped and formed by its particular context. Like the BMAS, in each of the three unique community-based approaches, the people were members of the faith community in which they served. Thus, they were familiar with their unique context and their training was contextual. Although each context was unique, these approaches to training provided an alternative pathway for lay people to develop the appropriate competencies for their particular context and role. Similar to the evening chapels, they were trained to provide and lead adult religious education for their peers in their particular faith community. The training in each of these three contexts was a form of apprenticeship and situated learning in their real-world contexts through which these lay people acquired the knowledge and skills to engage in various dimensions of adult religious education work.

One advantage of the CoP approach for training and developing adult religious educators was that learning was situated, contextual, and relational. These CoPs highlighted the importance of the training being situated in an authentic practice context. Furthermore, training

in the local context allowed adult religious educators, who were familiar with the context, to be truly responsive to local needs and concerns. This is especially important in a country like Canada which has many diverse sub-cultures not only in wider Canadian society but also within the Canadian Catholic Church.

Another advantage of the CoP approach with respect to situated learning was that it was designed to facilitate training and active engagement in one's home parish. The members of these CoPs were able to learn in their home environment and local parish, the context in which the member was serving. The dimensions of situated learning included dialogue, mentorship, experiential learning, and application of what they were learning in their local context. As well, through situated learning, the lay persons in these CoPs appeared to develop a deeper sense of co-responsibility for the Church's mission.

It was worth noting the lay members of these CoPs were not professional religious educators. Similar to Jesus' disciples and the lay leaders of the evening chapels in 18th-century Naples, the lay members being trained were drawn from their communities. It can be reasonably presumed the lay members of these CoPs had a variety of existing knowledge, skills, occupations, life experiences, and various levels of secular formal education completed ranging from elementary level to post-secondary level. Also, it was reasonable to presume most of the members, if not all, did not have higher education in religious education or Catholic theology. A CoP approach to training and leadership development provided a pathway to serve in adult religious education work.

Depending on the context, it may be appropriate to draw upon insights from non-western perspectives and worldviews on the diverse ways of adult learning and knowing which emphasize "learning is communal, learning is lifelong and informal, and learning is holistic" (Merriam & Kim, 2009, p. 73), and does not separate the spiritual from the secular (Merriam & Kim, 2009, p. 77). This is equally applicable to Indigenous ways of learning and knowing. This could broaden the understanding and practice of adult religious education (Merriam & Kim, 2009, pp. 71–81). In particular, ways of knowing and learning in western and non-western Indigenous cultures, and sociocultural ways of knowing and learning in non-western countries emphasize "learning is the responsibility of all members of the community because it is through this learning the community itself can develop" (Merriam & Kim, 2009, p. 73).

Merriam and Kim (2009) pointed out, "Lifelong learning in non-Western settings is

community-based and informal” (p. 75), and moreover, “it is the responsibility of members to both teach and learn” (p. 74). Awareness of and sensitivity to non-western perspectives and worldviews certainly has implications for culturally responsive and respectful training and leadership development of potential adult religious educators and leaders drawn from the membership of Canada’s increasingly multicultural and multiethnic parishes, and Canada’s Indigenous Catholic faith communities.

Mentorship is a form of situated, contextual, and relational learning. The opportunity to learn, and to be mentored both individually and within a supportive community, would likely be very appealing to newcomers to adult religious education work and also to those persons with experience in adult religious education. Members of a CoP who have acquired knowledge and experience in the field of adult religious education may be able to mentor newcomers, helping them to develop their confidence and competencies. Moreover, mentees themselves may become mentors in the future. English (1998, 1999c) highlighted the generative dimension of mentoring. Reasonably assuming those engaged in adult religious education were committed and generative individuals dedicated to the Church’s educational mission, mentoring allows them to pass on their knowledge, support others, and induct newcomers (English, 1999c, p. 401). English (1999c) underscored, “Providing mentorship for less experienced persons is a concrete and rewarding way of leaving a legacy” (p. 402). Also, mentoring was a part of the Church’s teaching ministry, which was a shared practice within the Church (Shields, 2008, p. 171).

The notion of passing on one’s knowledge and experience would likely be very appealing to those with knowledge and experience in the field of adult faith religion (English, 1999c, p. 402). However, there are different approaches to mentorship. Therefore, it is wise to train potential mentors so they understand the process. Shaw (2014) indicated, as beneficial as mentorship may be, mentoring has to be well designed and managed (pp. 112–114).

As a healthy and generative CoP matures, it recognizes the importance of welcoming and mentoring new members (Wenger et al., 2002, p. 108). Senior members and newcomers mutually benefit in a vibrant CoP. Newcomers benefit from the wisdom and expertise of the senior members, and at the same time, senior members benefit from the questions and insights of newcomers eager to learn and make their contributions to the CoP. To illustrate, even though it is not known how long the St. Joseph’s Certificate Programme existed, there was potential generativity because it was hoped the Programme graduates would continue to be involved in the



Programme as animators, facilitators and visionaries.

***Small groups.*** With respect to parish-based religious education for adults, the GDC (CC, 1997) stated it was necessary to have a nucleus of mature Christians who presumably could be engaged in adult religious education work in the parish, suggesting this objective could be more easily achieved by the formation of small groups (para. 258.c). Even prior to the publication of the GDC (CC, 1997), John Paul II (1979b) emphasized, “That is why every big parish or every group of parishes with small numbers has the serious duty to train people completely dedicated to providing catechetical leadership (priests, men and women religious, and lay people)” (para. 67).

Wickett (1991) suggested the value of a core group, whether salaried or volunteer, of competent, trained lay persons to assist the faith community to achieve its goals (p. 13). One significant goal of any Catholic parish is to engage in adult religious education as advocated and envisaged in the GDC (CC, 1997). With respect to training and developing leaders for Catholic faith communities, Mancini (2014) recognized the importance of “creating small support groups for leaders” (p. 12). Given the scale of small groups, it is implicit they were beneficial for fostering collaborative and collective learning with companions, experiential learning, and providing support.

About three decades earlier, after outlining the many challenges and limitations of providing adult religious education in the Canadian Catholic context, *Adult Faith, Adult Church* (CCCB, 1986) stated, “We need to find creative solutions to providing leadership, expertise and service” (p. 62). The CoP approach facilitates taking members from the parish community who would like to contribute to the work of adult religious education without a drastic addition of resources which are not likely available or reallocation of existing resources. One key advantage of the CoP framework is its inherent flexibility in the sense it can develop and evolve in any particular parish context. A parish-based CoP for training adult religious educators and leaders has potential to be responsive to the unique circumstances and needs in its environment.

Adopting and implementing a CoP approach may be one feasible solution to make headway in training adult religious educators and leaders which may be sustainable and cost-effective, or from a community development perspective, mobilize existing, or even unidentified talents and gifts already present in the parish community. The Church honors the importance of historical continuity and learning from its tradition. Even though not specifically

articulated as a CoP, it is evident CoP principles were employed for training lay leaders and there were precedents of CoPs. By looking to the Church's tradition for insights and possible solutions to current challenges, the application of the CoP approach offers a mechanism to train and develop adult religious educators and leaders and thereby revitalize adult religious education in the contemporary Canadian sociocultural context (Otero & Cottrell, 2013). The application of current educational theory is consistent with historical practices and has potential to enhance adult religious education teaching and learning as part of wider institutional renewal.

***Communities of practice within the Church's formal structures.*** A CoP can exist and be nurtured within the Church's formal structures. As an organizational form, a CoP has the advantage it can exist informally within the larger structures and organizational culture of a Catholic diocese or parish yet at the same time complement existing structures (Wenger & Snyder, 2000, pp. 139–140). Thus, a CoP, informed by and committed to the Church's overarching vision, purpose, and goal of adult religious education, can “complement existing structures and radically galvanize knowledge sharing, learning, and change” (Wenger & Snyder, 2000, p. 139). Shields (2009) explained CoPs were not about the distribution of power or restructuring roles and functions within an ecclesiastical organization but rather CoPs can be an effective part of the larger organization of which they were a part, for example, parishes (p. 335). At the same time, a healthy CoP should have built-in opportunities for dialogue within the parish community it serves, and between itself and the larger faith community to ensure there are continuous opportunities for growth and review (Bedford, 2012, p. 30).

Along with a CoP's ability to exist within the formal structures of the Church, the goodwill and support of the Church's formal leadership are necessary as Chua (2006) pointed out in the case study of the demise of a CoP. Along with this goodwill, the Church may be able to provide a variety of practical support as Choi (2006) reported about the case of a large corporation providing practical support for its CoPs. Just as the large corporation strongly encouraged its employees to participate in a CoP to acquire new knowledge and skills, the parish which fostered developing informal leaders strongly encouraged parishioners to participate in a small group to learn something new about the Catholic faith. In the parish situation, the members of the small groups, like the employee training program in a large corporation, were informally self-directed and self-led with respect to deciding what they wanted to learn. Like what the large corporation did for its CoPs, the parish provided a variety of practical support for

the small groups.

At the local level, the CoP approach to training adult religious educators and leaders in these three unique contexts appeared to be fruitful because these efforts were implicitly supported by the faith community's pastors and leaders. Equipping, nurturing, and empowering members to engage in adult religious education was supported by clergy leadership. Even if implicit, there was a commitment to developing leadership from within the faith community.

**Barriers to implementing a community of practice approach.** Adopting and implementing a CoP approach to training and developing adult religious educators and leaders for the parish milieu may face certain leadership, organizational, and institutional barriers which may overlap to varying degrees depending on the individuals involved and any limitations in a particular situation.

A CoP approach likely requires a priest-pastor who will have a relatively long-term tenure in a particular parish. Also, this approach presupposes the priest-pastor, along with other types of parish leaders, have the capacity to train others in adult religious education practice, are willing to engage in authentic collaboration and collaborative leadership, and are able to invest the time and energy to strategically operationalize such an approach.

The GDC (CC, 1997) stated, "Experience bears out that the quality of catechesis in a community depends very largely on the presence and activity of the priest" (para. 225). This statement appears to presuppose a parish priest will have adequate education and training in religious education, and especially adult religious education since the Church considers religious education for adults the chief form of catechesis (CC, 1997, para. 59). However, although religious education is one key area of the parish priest's responsibilities, traditional training programs for the priesthood may not adequately prepare priests to provide leadership in this area of parish life. Regarding the preparation of religious educators, pastoral agents, and priests, Alberich and Vallabaraj (2004) pointed out, generally speaking, training for religious education work was insufficient (p. 12).

A CoP approach to training adult religious educators and leaders implies authentic collaboration and collaborative leadership paradigms in the parish milieu. As the formal leader of the parish, the parish priest's interest, goodwill, and support, and along with that of other parish leaders, is absolutely essential for a CoP approach to thrive in the parish environment. Ultimately, the development of a CoP within a parish is dependent upon a priest-pastor who is

willing to invite people to become engaged in various aspects of adult religious work, and moreover, is willing to invest in and enable this type of training and development of adult religious educators and leaders. Enabling and empowering lay people who engage in adult religious education work and leadership in the parish milieu may represent a significant organizational culture change in a parish. Even though not within the purview of this dissertation to explore and discuss leadership and organizational culture change, Schein (2004/2011) suggested, “If one wants to distinguish leadership from management or administration, one can argue that leadership creates and changes cultures, while management and administration act within a culture” (p. 352).

Adopting and implementing a CoP approach for training adult religious educators and leaders may initially require a significant investment of time and effort for deployment and strategic operationalization in a parish. Therefore, stable relatively long-term pastoral leadership in a parish is necessary. The pattern of regularly reassigning parish priests after several years to different parishes within a diocese may hinder developing and deploying a CoP approach to training adult religious educators and leaders in the parish milieu. Furthermore, even if a priest-pastor operationalizes such an approach, a newly assigned priest to a parish may have another approach to parish leadership which is more hierarchical. If the diocesan bishop is committed in principle to adopting and implementing this approach within the diocese, even incrementally in one parish or cluster of smaller parishes, one at a time, priests-pastors may be expected to facilitate developing this approach in the parish they are assigned to.

Apart from considering the abilities or willingness of individual priest-pastors to adopt a CoP approach to developing adult religious educators and leaders for the parish, another barrier to operationalizing a CoP approach to training adult religious educators and leaders is the current reality many Canadian parishes do not have their own resident priest. One consequence of major institutional changes and reorganization is the paradigm of at least one priest per parish has dramatically changed. It is not uncommon that one priest may be serving a number of parishes over a large geographical area, or in other situations, a priest visits a community occasionally to celebrate the sacraments. In Canada, rural areas in the south and large geographical regions in the north and far north are especially wanting of priests. Whether a parish has its own priest or one priest is responsible for several parishes, the routine administration of a parish, the performance of priestly functions, and many other pastoral demands often creates a very heavy

workload for an individual priest. This leaves very little time and energy for an individual priest, even if so inclined, to foster a CoP approach.

Depending on the persons involved and any limitations in a particular situation, a number of overlapping leadership, organizational, and institutional barriers may preclude or present difficulties in considering the adoption and implementation of a CoP approach to facilitate the training and development of adult religious educators and leaders in a specific context.

### **Discussion and Conclusions Regarding Related Challenges and Concerns**

This section of Chapter Five discusses the findings and conclusions regarding related challenges and concerns concerning the role of lay persons and clergy in the parish, principles for exercising leadership, co-responsibility, and collaboration with respect to adult religious education work and leadership in the parish, and adopting models of distributed leadership, and in particular, fostering women in educational leadership roles.

The findings indicated there may be different understandings and expectations regarding the roles of lay persons and clergy in the parish which resulted in tension and conflict. The underlying sources of tension and conflict appeared to be confusion regarding the division of labor and exercising of leadership in the parish, and clericalism. This tension has implications for understanding how authentic collaboration and collaborative leadership may be exercised in the parish particularly with respect to adult religious education work and leadership. Furthermore, if these types of tensions are not acknowledged and faced, in all likelihood, it will be difficult to attract and retain individuals who may be interested in becoming engaged in adult religious education work if they feel they may become embroiled in conflict.

Clergy and lay persons need to have clear and shared understandings about the purpose of leadership and how it is to be exercised. Despite the ideals that collaboration and collaborative leadership between clergy and lay persons in the parish represents, there is the risk that lay persons in leadership roles in the parish can also adopt a clericalist mind-set. Some lay leaders, in their leadership style, may not be exempt from the same faults and shortcomings that some clergy have been accused of with respect to clericalist attitudes and behaviors which may have contributed to tensions and conflicts. Catholic media has reported about Pope Francis lambasting the evils of clericalism (Brockhaus, 2016; San Martín, 2016). Clericalism in all its manifestations needs to be confronted, challenged, and eradicated.

Persons in leadership roles in the parish, whether clergy or lay persons, are called to love

and serve others in a spirit of humility, not from a position of privilege and superiority or sense of entitlement. The CCCB (2016b) emphasized each Catholic lay person was called to be co-responsible for the Church's mission with all the other members of the Church and to participate in the life of the Church (pp. 1–3 (sec. 2–6)). Providing religious education is one among the many responsibilities or roles lay persons may have within the parish (CCCB, 2016b, p. 3 (sec. 6)). However, the CCCB (2016b) pointed out “co-responsibility is not identified so much with these functions or roles themselves, but rather with the concern that we have for the entire mission of the Church in exercising them” (p. 3 (sec. 6)). It is critical to clearly understand what this means because of the implications for collaboration and collaborative leadership, engaging in adult religious education work and leadership in the parish, and developing CoPs within the parish. The end of exercising a leadership role, whether by clergy or a lay person, is to empower and equip others to assume co-responsibility for the Church's mission in their unique life situation.

Traditional training programs for the priesthood may not have provided training in collaborative models of leadership. Mallon (2014) highlighted the essential role of priestly leadership, the challenges of parish leadership, and the great need for leadership development among priests (pp. 233–244). Individual priests, through no fault of their own, may simply not have the competencies to engage in collaborative leadership in parishes depending on their formal education and training for the ministerial priesthood, and also, their prior relevant education and training, and professional work and life experiences.

The Church has an established hierarchy and governance structure but within the parish it is possible to create new leadership paradigms which are inclusive of those in both formal and informal leadership roles with respect to adult religious education practice and leadership. *Distributed leadership*, as an approach to collaborative leadership, is especially relevant for adult religious education leadership in the parish context (Harris & Spillane, 2008). Clergy have specific leadership roles in the Church, but Dulles (1983) noted ministry, and implicitly leadership, is not restricted to clergy (p. 12).

The noteworthy element of distributed leadership is that it recognizes the existence and capacities of multiple leaders as compared to one single leader. Moreover, some of these leaders may not be formally designated as leaders, but may emerge at any given time depending on the situation and assume leadership responsibilities (Spillane & Coldren, 2011, p. 31). Distributed

leadership focuses on the interactions and interdependence between all the leaders, whether formal or informal, in their particular situation (Spillane & Coldren, 2011, pp. 31–32).

Distributed leadership emphasizes leadership practice rather than leadership roles and function, and “leadership *practice* is viewed as a product of the interactions of school [parish] leaders, followers, and their situation” (Spillane, 2005, p. 144). Distributed leadership fosters thinking about leadership practice in terms of the interactions, interdependency, and interconnectedness among the different and multiple kinds of leaders, for example, who may be in a parish, including both formal and informal leaders (Spillane, 2005, p. 145).

In the Catholic context, a model of distributed leadership may foster co-responsibility in carrying out adult religious education work in the parish among those who officially may have different leadership roles and status in the parish, but in practice actively demonstrate a strong commitment to shared leadership in adult religious education work. What is significant is distributed leadership inherently breaks down hierarchy. Clergy and lay persons, who officially may have different leadership roles and status in the faith community, may in practice actively demonstrate a strong commitment to distributed leadership in carrying out adult religious education work in the parish. Further, the distributed leadership perspective appreciates there is often untapped and unrecognized leadership capacities found among persons who do not occupy formal leadership positions within organizations.

*Evangelii Gaudium* (Francis, 2013) indicated there was a need for more lay people to be engaged in religious education work and identified clericalism as an ecclesial challenge (para. 102). There are risks and challenges involved in developing more collaborative working relationships and effective partnerships between the clergy and lay persons. Both priests and lay persons have to be willing to embrace and enable collaboration and collaborative leadership. Openness and flexibility on both parts with mutual respect undergirding the relationship, and a willingness to learn from each other is what will foster and enrich the practice of distributed leadership with respect to carrying out adult religious education work in the parish. These relationships should reflect mature relationship paradigms which understand the characteristics and dynamics of healthy working and personal relationships and foster authentic collaboration and collaborative leadership.

Relatedly, the findings indicated clergy need to be willing to let lay people be creative and undertake new initiatives, and allow them to have active, real, and meaningful leadership

roles in the parish. In order for a parish to flourish, the Church cannot afford to overlook the potential of Catholics, both men and women, of deep faith and commitment who may be variously talented and have the desire, time, and energy to become engaged in adult religious education work and leadership in the parish milieu.

Westenberg (2016) stated, “Broadening the concept of ministry, with the inclusion of men and women in diverse roles in the Church . . . does not denigrate the role and importance of the ordained priesthood” (p. 34). When that premise is accepted, it is possible to create new leadership paradigms at the parish level. Even though priests and lay persons have distinct roles in the parish milieu, ideally, competent and mature leaders in a healthy parish foster collaboration and collaborative leadership by recognizing and respecting lay persons’ gifts, and allow lay persons to make meaningful contributions according to their gifts.

### **Fostering Women in Educational Leadership Roles**

The reality is women constitute the bulk of religious educators (English, 2012, p. 45), and may be those most interested in becoming lay adult religious educators. Despite theological, structural, and systemic factors which exclude Catholic women from the ordained priesthood and governance in the Church, it is being recognized women need to assume important leadership roles in the Church. *Evangelii Gaudium* (Francis, 2013) acknowledged many women share pastoral responsibilities with priests, but more importantly, stated there was “need to create still broader opportunities for a more incisive female presence in the Church” (para. 103).

The Church, as an educational organization, cannot afford not to avail itself of women’s gifts and contributions to the adult religious education enterprise. Adult religious education is one area where meaningful leadership by women could be greatly expanded leadership roles. One Canadian bishop specifically highlighted women be deliberately and systematically included in leadership roles at all levels of the Church, and implicitly called for new paradigms to foster shared leadership (CCCB, 2012).

Clarifying the role of lay persons and clergy in the parish, principles for exercising leadership, co-responsibility, and collaboration, adopting models of distributed leadership, and fostering and enabling lay persons, both men and women, to contribute to adult religious education work and leadership in the parish are issues that may need to be addressed in any particular context. If the formal leadership of the Church, as represented in the clergy, is not willing to empower and equip such persons and provide meaningful opportunities to use their



gifts, they are not likely to step forward. Each one's contributions to the work of adult religious education, whether a lay person or a priest, needs to be respected, recognized, and valued.

### **Discussion and Conclusions Regarding Educational Historiography**

Religious education has been at the heart of Church's identity and mission from its very beginnings (CC, 1997, para. 59). It should be noted adults were the focus of religious education endeavors in the early history of the Church (Elias, 2002, pp. 1, 21). Therefore, broadly speaking, it was worthwhile to undertake historical inquiry in the field of adult religious education. However, Lawson (2006) remarked, "It was not enough to know what was done in the past" (p. 159). Gall, Gall, and Borg (2010) stated, "What we learn about the past gives us new ways of thinking about the present and stimulates our thinking on improving the practice of education" (p. 434). Also, a rationale for historical inquiry in education was such an inquiry may shed light on past policy and practices and help us understand how the current situation came to be (Freathy & Parker, 2010, pp. 233–235).

Historical inquiry in education, particularly in non-formal and informal adult religious education in different eras and contexts, may help us discover past practices which may be applied to address contemporary challenges and concerns (Johnson & Christensen, 2014, p. 469). Drawing on insights from what made religious education work fruitful in its time and place, Lawson (2006) believed historical inquiry in religious education was gainful because alternative approaches to contemporary religious education work may be considered which may potentially offer rich rewards (p. 159).

Given the historical challenges Canadian Catholic parishes have experienced in parish-based adult religious education practice as outlined in the CCCB's three major publications about adult religious education (CCCB, 1986; CCCB, 1993; CCCB, 2011), this historical inquiry regarding the training and development of adult religious educators and leaders for Canadian Catholic parishes merited investigation. The lack of well-prepared personnel to engage in adult religious education work and the challenges of providing training were the springboard for this educational historiography. It was worthwhile to examine the different approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes during the 1983 to 2011 period to acquire a historical consciousness of these approaches. Also, a historical awareness of informal approaches to training and developing adult religious educators and leaders in biblical times and in 18th-century Naples and, more recently,

community-based approaches in three unique Canadian contexts, the training of Inuit lay leaders, a diocesan approved initiative to support the training of adult religious educators and leaders, and the training of informal adult religious educators and leaders in one parish, may help us extrapolate the underlying principles and practices which potentially could be mobilized for contemporary purposes.

### **Implications**

The findings and conclusions of this study have implications for theory, policy, practice, and further research which are presented in this section of Chapter Five.

#### **Implications for Theory**

The findings of this study have implications for theory with respect to the reflections it prompts on the impact of social constructivism in Catholic faith communities and how to best mobilize educational theory to improve practice. This study prompted reflections on the impact of the interface of theological and social constructivist paradigms in Catholic faith communities in the sense of considering Catholic faith communities both as a spiritual entity and a human organization. The process of collecting and interpreting data in this study was consistent with social constructivism. Approaches to facilitate the training and development of adult religious educators and leaders for parishes were socially constructed in a local context but also in response to the larger context of the global Church and the changing social and ecclesial environment in the aftermath of the Second Vatican Council. Various approaches to facilitate the training and the development of adult religious educators and leaders were influenced by specific contexts and individual and communal histories, traditions and cultures (Swinton & Mowat, 2016, p. 6).

Regarding the challenges in providing adult religious education in parishes and the lack of research to guide and inform decision-making, Utendorf (1987) commented:

The academic background of adult religious educators was usually in theology rather than in educational practice; thus many lack the skills necessary to undertake the needed research or to locate relevant studies in the broader educational literature, if they are even aware that such research is available and would be helpful. A cursory look at any of the religious education journals will similarly reveal a preoccupation with theological concerns rather than with education research. (p. 26)

English (2010) remarked “the Church has not embraced the social sciences, and

certainly not education, in any substantive way in its teaching” (p. 145), implying the Church could potentially benefit from the insights of the social sciences and the field of adult education with respect to adult religious education. Engagement with theory from the field of education and the social sciences enables different ways of knowing that can be connected with theology which can help advance adult religious education theory and practice (Cameron, Bhatti, Duce, Sweeney, & Watkins, 2010).

The findings of this study suggested community-based approaches to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes may be one feasible strategy to consider. In particular, the theoretical assumptions underlying CoPs of situated, contextual, and relational learning and how people develop competencies in adult religious education work have implications for theory with respect to understanding non-formal and informal adult learning. Relatedly, the findings of this study also have implications for theory with respect to community development, educational leadership development, distributed leadership, organizational culture, organizational change and renewal, global and local contexts, and structures and systems. However, one missing piece in this conceptualization of how the CoP approach could be operationalized was with respect to the nature and practice of leadership in the actual organizational realities, complexities, and dynamics of any particular parish context.

### **Implications for Policy**

As reflected throughout the GDC (CC, 1997) the overarching purpose of parish-based adult religious education is about fostering maturation in the Christian faith in all its dimensions, individually and communally. Adult religious education can contribute to shaping a vibrant parish culture which encourages all parishioners to exercise co-responsibility for the Church’s mission within the Church and in the wider community in their unique life situation.

Since the Second Vatican Council, the Church through a number of official ecclesial documents (see Appendix J), particularly the GDC (CC, 1997), emphasized religious education for adults should be the principal form of religious education (paras. 59, 258), and affirmed the importance of lifelong adult religious education (paras. 48, 51, 56, 69–71). Also, the GDC (CC, 1997) emphasized the parish should be the prime provider of adult religious education because it was the key form of faith community and primary place where people experience the Church (para. 257). The GDC (CC, 1997) outlined the parish’s responsibilities with respect to religious

education, highlighting “adult catechesis must be given priority” (para. 258), and every ecclesial community must provide ongoing and systematic religious education for all adults (para. 176).

From an educational policy perspective, the GDC (CC, 1997) should be regarded as a diocese’s or parish’s guiding document for adult religious education policy and practice. In brief, the GDC’s (CC, 1997) two foundational principles for adult religious education policy and practice were, first, religious education for adults is the principal form of Christian education and second, the parish is the primary educational community for adult religious education (paras. 59, 257, 262, 275). Vallabaraj (2008) emphasized the GDC (CC, 1997) “in a forceful and clear manner . . . proclaims the catechesis of adults *as the central element and point of reference* for all other forms of catechesis” (p. 7).

Within the official institutional governance structure of the Church, each bishop is autonomous in the service of the diocese. The GDC (CC, 1997) pointed out it was the bishop who was primarily responsible for religious education in the diocese (para. 222). Adult religious education policy and practice is one significant dimension of the bishop’s responsibility for religious education in the diocese. Correlatively, the bishop is to assume the overall direction of religious education which implies religious education is a priority with the necessary human and material resources dedicated to this work, ensure adult religious educators are adequately prepared to carry out their tasks and responsive to people’s needs, and “establish an *articulated, coherent and global programme*” for religious education which should be integrated into the diocesan pastoral plan (CC, 1997, para. 223). Also, the GDC (CC, 1997) emphasized “a fundamentally decisive element must be the *catechetical formation of priests* both at the level of seminary formation as well as at the level of continuing formation. Bishops are called upon to ensure they are scrupulously attentive to such formation” (para. 234).

There are implications for policy on two levels. First, while not diminishing the need for religious education for children and youth, transitioning to an adult-centered paradigm for religious education requires a significant change in mind-set, and moreover, the conviction and commitment to do so. *On Good Soil* (CCCB, 2011) commented about the predominant focus on religious education for children (CCCB, 2011, p. 37 (sec. 17)). Putting adults at the center of the parish’s religious education efforts is much “easier said than done” and requires “nothing short of a paradigm shift in thinking and practice” (English, 2010, pp. 133–134). Second, the parish must unequivocally be regarded as the primary educational community for adult religious

education (CC, 1997, paras. 257, 262).

Whatever the unique considerations and pastoral situation in any particular diocese or parish, these two foundational and universal principles are the guiding elements of adult religious education policy. Correspondingly, to engage in parish-based adult religious education presupposes there were well-prepared personnel, both lay persons and clergy, who can competently engage in and support adult religious education work in their unique parish context as advocated and envisaged by the GDC (CC, 1997).

### **Implications for Practice**

One significant area of practice with respect to the Church's teaching ministry is training and developing adult religious educators and leaders for religious communities such as parishes. Chafe (2000b) emphasized "adult catechists need to be a priority and formation needs to be intentionally visioned so that it is less fragmented and more integrated. We need to provide solid cultural and theological training, theory, and opportunities for practice (including apprenticeships, integration processes and more)" (p. 4). This has been a challenging task for the Canadian Catholic Church.

There is a need to increase the number of persons who can work in the area of adult religious education in Canadian Catholic parishes and assume a leadership role in this area of parish life. Along with attracting new persons to this work, it may be necessary to support them in developing their capacities to serve the parish as adult religious educators and leaders. Parish-based adult religious education ought to be intentionally carried out or coordinated by persons who have the appropriate training for their particular context and role (CC, 1997, para. 234). The GDC (CC, 1997) highlighted there was also a need for specialized religious educators (para. 233). The *Final Propositions* (Synod of Bishops, 2012), a document issued by Synod of Bishops on the New Evangelization for the Transmission of the Christian Faith, held in 2012, highlighted the "indispensable service that catechists provide the ecclesial communities" and religious educators needed to be "well prepared" (para. 29).

Three principal ecclesial documents outlined the qualities and competencies religious educators and leaders ideally should have, and the process for training and development (CC, 1997, paras. 233–252; CEP, 1993, paras. 19–26; ICC, 1990, paras. 70–73). Educational leaders must have the ability to collaborate (CC, 1997, para. 219; CEP, 1993, para. 26), and "be capable of supporting and leading other adults on their journey of growth in the faith . . . [and have] the

ability to listen and dialogue, encourage and reassure, form relationships, work in teams, and build community” (ICC, 1990, paras. 71, 73) were the leadership competencies described in these documents. Also, regarding training religious educators, the Church highlighted “absolute precedence must be given to quality” (CEP, 1993, para. 5). Following basic and initial preparation to engage in adult religious education work, the Church emphasizes religious educators need continuing formation (CC, 1997, para. 233; CEP, 1993, para. 29; ICC, 1990, para. 77).

The GDC (CC, 1997) outlined various ways the initial and ongoing training and development of religious educators and leaders could be accomplished. These ranged from informal learning to non-formal programs to formal degree-level programs in higher education institutions, suggesting that the level of necessary preparation depends on the individual religious educator’s context and role, and level of responsibility and specific mandate (CC, 1997, paras. 221, 246–251).

*On Good Soil* (CCCB, 2011) suggested calling forth persons from the community to serve in the area of adult religious education and leadership, and support their initial and ongoing training and development (pp. 195–196 (sec. 156)). The key underlying premise of drawing upon persons to assume leadership roles in parishes has much to commend for the Canadian context. However, *On Good Soil* (CCCB, 2011) did not address how to identify and recruit potential adult religious educators and leaders. *On Good Soil* (2011) outlined the attributes adult religious educators should possess (pp. 195–196, (sec. 156)), and based on the GDC (CC, 1997), the general elements of and guidelines for training adult religious educators (pp. 202–208 (sec. 164–165, 168)).

After 30 years or so, given the past and continuing challenges in training and developing adult religious educators and leaders for the parish milieu, and considering how to move forward and plan for the future, a number of important overlapping questions need to be asked:

- Similar to the documents and resources on a variety of themes and topics to inform and guide Canadian Catholics which are periodically issued by the CCCB, would it be helpful if the CCCB issued such a document that clearly articulates a Canadian vision for adult religious education?
- In the contemporary Canadian sociocultural and ecclesial environment what is required as preparation for work of adult religious education in the parish milieu?

- Who may be potential adult religious educators and leaders for the parish context?
- Do adult religious educators necessarily need graduate level training in religious education?
- What level of expertise is required? Is the level of expertise required contextual?
- What should a strong integrated curriculum for training adult religious educators which speaks to the contemporary Canadian sociocultural context include? Who should develop this curriculum? Should this curriculum be developed at the national level, regional level, or diocesan level? Should this curriculum reflect the ethnic and cultural diversity of the Canadian Catholic Church?
- How can this training be organized and delivered in a cost-effective manner?
- What are potential venues to train adult religious educators?
- Is it possible parishioners can be animators of adult religious education in a parish or cluster of parishes regardless of their level of formal education completed without going through an intense training process?
- Should there be a framework and mechanism to assess an individual's attributes and specific competencies pertinent to adult religious education practice which could be considered in lieu of formal education in religious education? What should be the criteria and who is qualified to do this evaluation?
- How can training be provided so human and material resources are prudently used?
- How could continuing education for adult religious educators and leaders be provided and facilitated?

To alleviate the shortage of adult religious educators within parishes there may be adult Catholics of deep faith and commitment who may have the desire and willingness to serve their parish in the area of adult religious work. There may be talented individuals with an array of accumulated transferable and demonstrable competencies and considerable expertise which could be reconfigured and leveraged for carrying out adult religious education work. These persons, who developed these competencies and skill sets through formal and informal education, occupations, leadership roles, and many other types of rich life experiences, with further learning and appropriate support, may be capable of giving dedicated and excellent service in the area of adult religious education. However, a very significant challenge is receiving the appropriate education, training, and mentoring to develop the necessary competencies for their particular context and role. Relatedly, what kind of training and

development can be offered which recognizes this wealth of life experience and better supports the needs and lifestyle of such lay persons? How can this desire and willingness be better tapped and supported? How could the Church maximize the potential contribution of these persons?

English (1998) argued “wholehearted commitment to professionalizing religious education is urgently needed” (p. xi). English (1998) never defined what was meant by professionalization but implied a modern model of professionalization which regarded the work of religious education as a conventional profession in which the person is highly educated and progressively developed and improved their professional competencies (pp. xi, 21, 64, 74, 85). English’s (1998) argument that religious education needs to be professionalized speaks to the need for religious educators to have the appropriate training for their particular context and role. Certainly, the GDC (CC, 1997) insisted religious educators be adequately trained (para. 234). In a typical parish, adult religious education can encompass many different dimensions and occur in many different ways. Many people in a parish potentially could engage in some form of adult religious education work but they need some type and level of preparation. The questions are, what level of expertise would they need and how can this training be provided? A person who has higher education and experience in the area of adult religious education potentially could exercise a leadership role and may have much to offer with respect to equipping and empowering others to engage in adult religious education.

As appealing as the CoP approach may initially appear, consideration must be given to how to build and sustain CoPs and integrate them into the existing structures of the Church. This will not be an easy effort or a panacea to address the long-standing challenges of training and developing adult religious educators and leaders for Canadian Catholic parishes. Prior to adopting and implementing a CoP approach, foundational considerations, consultations, and planning to develop a coherent holistic approach to training and developing adult religious educators and leaders which is responsive to a parish’s unique circumstances and needs is required. Also, adopting and implementing a CoP may involve in-service training for clergy and other types of leaders to introduce and explain the CoP approach. It is also prudent to take into account the possible barriers to adopting and implementing a CoP approach. A CoP approach is not about superficial quick fixes or developing new programs.



## Implications for Further Research

The Master once asked his disciples which was more important: wisdom or action.

The disciples were unanimous: “Action, of course. Of what use is wisdom that does not show itself in action?”

Said the Master, “And of what use is action that proceeds from an unenlightened heart?”

Quoted from *One Minute Wisdom* by Anthony De Mello, S.J.

In the aftermath of the Second Vatican Council, Gannon (1967) pointed out the Second Vatican Council, in its documents, made pointed references to the important role academic research must play in modernizing the Church’s work (p. 4). These documents emphasized the benefits and relevance of theoretical insights from the social sciences to the practical realm of the Church’s pastoral work. The GDC (CC, 1997) highlighted higher education institutions engaged in training religious educators and leaders “*should [also] devote themselves to a congruent level of research in catechesis* [emphasis added]” (para. 251).

Renihan and Renihan (2015) noted the field of educational administration and leadership draws from the various disciplines of the social sciences (p. 276). They argued for *engaged scholarship*, that is, scholarship which has the potential to bridge the theory/practice gap, remarking “the age-old tradition of the ivory tower speaking truth to the practitioners is an anachronism” (p. 281). The worlds of the academic and the practitioner may seem very far apart. However, engaged scholarship has the possibility of fostering mutually beneficial relationships between researchers and practitioners. In particular, insights from the body of theory about educational administration and leadership may foster capacity to engage in parish-based adult religious education.

Renihan and Renihan (2015) emphasized academic research has the potential to provide solutions to perplexing problems especially if it was successfully translated into administrative and leadership practice (p. 282). This principle is equally applicable to other academic disciplines. Newton and Burgess (2015) pointed out the conception of scholars as producers of knowledge and practitioners as consumers of knowledge was no longer tenable (p. 6). Bringing theory and practice into dialogue, in a model of engaged scholarship, may potentially result in

theoretical insights informing an approach to or shaping the various dimensions of adult religious education practice, for example, training and developing adult religious educators and leaders.

As far back as 1986, the CCCB recommended research studies be undertaken (CCCB, 1986, pp. 70–71). Kuzmochka (2014) emphasized the need to develop a body of sound empirical research to support adult religious education in the Canadian Catholic context (pp. 260–261). In discussing the future of the Church in western Canada, McMorow (2010) indicated, “No one in the Canadian Catholic Church at a national, provincial or diocesan level is releasing data that attempts to chart what is happening regarding active church membership” (p. 7) and recommended quantitative and qualitative studies be undertaken. Up-to-date empirical research, not only in educational administration and leadership but in other academic disciplines could potentially create new and useful knowledge to inform and contribute to the development of sound theory and evidence-based adult religious education practice, thereby furthering the work of adult religious education which is responsive to the contemporary Canadian Catholic context. Given the inherently interdisciplinary and multidimensional nature of adult religious education, empirical and historical research may also complement scholarly work in Catholic theology and Catholic Studies.

The Centre for Religious Education and Catechesis (CREC) was established in 2012 at Saint Paul University in Ottawa, ON. Information available on the CREC’s (n.d.) website indicated its mandate was to cultivate “a multidisciplinary approach to applied research and reflective practice in religious education and catechesis that best responds to current needs”. Based on a Spring 2017 review of information on the CREC’s website, it was unclear how much progress has been made in developing its mandate and what its scholarly activities were. A center such as this may potentially be a forum for collaboratively engaged scholarship among scholars from across Canada, and even internationally given the Church is a global organization. The findings of historical inquiries and sound empirical research in religious education, especially in the Canadian Catholic context, could be disseminated through conference presentations and publications in academic and practitioner literature. Ideally, a center such as this can become a think tank for religious education in Canada, and eventually develop a peer-reviewed academic journal for religious education which welcomes scholarly work by Canadian scholars in diverse academic disciplines, and also from scholars in other countries. In contrast, other English-speaking countries such as Australia, England and Wales, Ireland, and the United

States have the capacity to undertake research which serves the needs of the Catholic Church in their respective country.

The Australian Catholic Bishops Conference has a Pastoral Research Office which has undertaken a variety of research projects (ACBC, n.d.). Reports of these research projects were available online (ACBC, n.d.). The Benedict XVI Centre for Religion and Society, a research center at St. Mary's University in London, UK, houses the Catholic Research Forum which aims to engage in academically rigorous and pastorally useful research and strategic thinking (Catholic Research Forum, n.d.). For example, a report about contemporary Catholicism in England and Wales was published in 2016 (Bullivant, 2016). The Irish Catholic Bishops' Conference has a Council for Research and Development and its research reports were published online (ICBC, n.d.). The United States has a central social science research center, the Center for Applied Research in the Apostolate (CARA) at Georgetown University, which undertakes social scientific research about the Catholic Church in the United States (McMorrow, 2010, p. 7). CARA has three major dimensions to its mission: (a) to increase the Church's self-understanding, (b) to serve the applied research needs of Church decision-makers, and (c) to advance scholarly research on religion, particularly Catholicism (CARA, n.d.). As well, the American National Association for Lay Ministry undertook a significant research project to explore emerging trends in pastoral leadership in American parishes and reported their findings (NALM, n.d.).

Freathy and Parker (2010), Lawson (2006), and Schweitzer (2006) recognized the contributions historical inquiry could make to religious education. Lawson (2006) emphasized the need for and the importance of rigorous empirical studies in religious education (p. 161). Schweitzer (2006) argued for strengthening empirical research in the field of religious education because empirical research procedures “not only [promised] important insights for religious education—they also [promised] academic credibility because they are part of the established methodology in a number of disciplines” (p. 167). Richardson (2014) discussed the positive value of undertaking studies using the empirical methods of the social sciences for exploring people's experiences and understandings of Catholicism (p. 63).

This educational historiographical instrumental case study about one dimension of the Church's teaching function was a contribution to the field of adult religious education scholarship in one academic discipline. Despite the dearth of empirical research in the field of adult religious education in the Canadian Catholic context, the upside is that there is potentially

much valuable research to be undertaken by scholars who regard the importance of the Church's teaching function as an essential one and deeply care about communicating and teaching the Catholic faith in the contemporary sociocultural environment. Other educational historiographies and empirical research employing various research methodologies about contemporary topics and concerns in the field of adult religious education could be undertaken. Also, articles in *Caravan*, reports in Canadian Catholic media, and a variety of other literature suggested topics for future research studies:

- educational historiographies about the work undertaken by individual dioceses or religious orders in adult religious education practice and leadership development may help in addressing contemporary concerns, and examining new options for the present and the future, for example, the work undertaken in the Archdiocese of Edmonton (Spicer, 1987, pp. 1–2);
- Summer Indigenous Pastoral Leadership Program provided collaboratively by Kateri Native Ministry, Ottawa, ON and Saint Paul University, Ottawa, ON (Gyapong, 2015a, p. 4);
- the Aboriginal Stream of the Lay Formation Program of the Roman Catholic Diocese of Saskatoon and its contribution the development of lay leaders for Canada's Indigenous Catholic faith communities;
- lay pastoral leadership training for Catholic communities in Canada's far north;
- in-depth qualitative studies to complement the 2015 findings of Bibby and Reid's (2016) survey of over 1,000 Catholics;
- comparative and cross-cultural studies about non-formal and informal adult religious education, both within Canada and internationally; and
- comparative studies about non-formal and informal adult religious education between Catholicism and other Christian denominations or religions.

Fallah (2011) indicated the literature, both theoretical and empirical studies, concerning the nature of leadership, leadership roles, and leadership styles and behaviors within a CoP in different types of organizations was deficient (p. 358). Fallah (2011) suggested several areas in which empirical research could be undertaken to advance understanding of the nature and practice of distributed leadership within CoPs (pp. 366–367). There may be thriving and vibrant parishes which have implemented collaborative or distributed leadership models within de facto CoPs. Utilizing Fallah's (2011) suggestions for empirical research, individual case studies of parishes which have implemented paradigms of collaborative or distributed leadership are

certainly worth further investigation as to what makes them work and why.

Stemming from this study's focus on the CoP framework, there exists possible configurations of various topics for future research studies as depicted below (see Figure 5.2).



*Figure 5.2.* Potential further research stemming from the CoP framework.

Given the paucity of scholarly research over the past three decades in the Canadian Catholic context on topics relevant to parish-based adult religious education, there is a need for various types of inquiries about adult religious education. Robust scholarly research, both theoretical and applied, potentially can support and serve the needs of the Canadian Catholic Church in the area of adult religious education.

### **Personal Reflections on the Dissertation Journey**

Given that the many papers I had written in my Master's and doctoral courses were on topics related to adult religious education and leadership based on themes from the discipline of educational administration and leadership, initially, I considered various topics for my dissertation. Dr. Craig A. Campbell, formerly of the Department of Educational Foundations (Adult and Lifelong Learning), and co-supervisor in the very early stage of my doctoral dissertation, metaphorically told me I should "select the most beautiful and representative bud from the healthiest and most important plant in your garden". This was some of the best advice I

received.

In considering possible topics for my dissertation as I reviewed the papers I had written in my Master's and doctoral courses, it seemed in one way or another, I often returned to the CoP theme. This was the healthiest and most important plant in my garden and I finally chose a bud from the CoP plant for my dissertation. I realized the Church had precursors of CoPs. Given a CoP's three structural elements of domain, community, and practice, and its key features of situated, contextual, and relational learning, I became convinced of the potential of CoPs to facilitate the training and development of adult religious educators and leaders for the parish. I also perceived the potentiality of the CoP framework being applied, not only to training and developing adult religious educators and leaders but to other areas of activity related to carrying out the Church's teaching function. Foundationally informed by and committed to the Church's vision for adult religious education, a CoP, whatever its specific domain and scope regarding a dimension of adult religious education policy and practice, may contribute to advancing what the Church advocates and envisages for adult religious education.

The starting point for considering methodological approaches to conduct this study was the methodological approach had to be suitable to conduct a study on a topic in the academic discipline of educational administration and leadership. Several methodological approaches to conduct this study were considered. In light of the lack of foundational historical or empirical research in non-formal and informal adult religious education in the Canadian Catholic context, it was decided to conduct a qualitative educational historiography. The principal and major source of data were documents supplemented by interviews. Given the eventual challenges of integrating the aggregated interview data with the documentary data, as a novice researcher, perhaps I was overly cautious in agreeing to report aggregated data in light of the particular sensitivities expressed by the research participants. In the end, the interview data confirmed many of the findings in the documentary data so the interview data did have value. However, with this being said, direct quotations may have enlivened the findings. As a member of the Catholic faith community, I wanted to honor the commitment to maintain the research participants' confidentiality. Given the need for research on topics relevant to non-formal and informal adult religious education in the Canadian Catholic context, it is possible I may wish to undertake future qualitative studies in Catholic settings or organizations which would likely include interviews and focus groups. Considering the many possible and complex sensitivities in

conducting research involving religion, I did not want to jeopardize future access to Catholic settings or organizations and potential research participants because of the perception that I would not be sensitive to research participants' concerns, not honor my commitments to them and their contributions to a study, or that I would conduct a study in an unethical or disrespectful manner.

There is a common axiom that if one studies theology one may lose one's faith. This axiom may be slightly revised. If one examines the Church through the lens of contemporary educational leadership and organizational studies with respect to communicating and transmitting the Catholic faith in the contemporary sociocultural environment one may lose hope. Being so deeply engaged and immersed in exploring various topics pertinent to the Church's teaching function, particularly parish-based adult religious education, throughout my Master of Education (Educational Administration) and Doctor of Philosophy (Educational Administration) programs, it was difficult not to feel daunted by the multiple and complex challenges the Canadian Catholic Church faces in engaging parish-based adult religious education.

Willig (2008) suggested the researcher's personal reflections about the process of conducting qualitative research may affect and even possibly change the researcher as a person (p. 10). Given my personal background and experiences as a Roman Catholic, apart from the academic dimension, all my graduate academic work was also a deeply personal and eminently complex journey with respect to helping me reflect upon many dimensions of the Catholic faith and process my understandings of what it means to be a Roman Catholic in the contemporary era both as a local and global citizen. I had the academic freedom to explore many themes in my academic work from both appreciative and critical perspectives.

I developed a deeper awareness of and insight into the leadership and organizational challenges the Church, particularly at the diocesan or parish level, faces with respect to engaging in adult religious education. As I acquired more knowledge and insights, my thinking about various matters regarding adult religious education policy and practice evolved. For example, as I examined the Church as an organization I realized I could draw many parallels between the Church and a large university as both institutions are large and complex, are simultaneously hierarchical and collegial in structure and governance, and have many diverse bodies within the institution, each of which contribute in their particular way to carrying out the institution's

mission. Based on the various roles I have had in a university environment for close to four decades, I have a wide range of experiential understandings of how collaboration and collaborative leadership plays out in many ways and on different levels in the everyday life and activities of a university.

As a Canadian Catholic who certainly does not see myself as parochial or tribal, I was somewhat perplexed by what I perceived as a lack of Canadian identity or voice. It was not within the purview of this study to do a content analysis of the documents but like Elias (1989) who observed *Adult Faith, Adult Church* (CCCB, 1986) drew on American sources, I noticed a similar phenomenon in *Caravan* and *On Good Soil* (CCCB, 2011) in two ways.

First, beginning in 1995 and until *Caravan* ceased publication in 2004, I noted many American Catholics served on its Editorial Advisory Committee and published numerous articles in *Caravan*. Certainly, Canadians can learn from American experiences but nonetheless, I found this phenomenon curious for a Canadian publication. Second, although *On Good Soil* (CCCB, 2011) recognized cultural diversity among Canada's Catholic population, it seemed unusual *On Good Soil* (CCCB, 2011) cited the United States Catholic Conference of Bishops' recommendation that the membership of a diocesan advisory committee for adult religious education should reflect the diversity of the diocese (p. 188 (sec. 145)). Given that Canada has long had a culturally diverse Catholic population, it can be assumed that the membership of a Canadian diocesan advisory committee for adult religious education would reflect the diversity of the diocese.

Rather than being daunted by the multiple and complex challenges, an opportunity may actually exist to grapple with these challenges and reflect more deeply while at the same time recognizing there are no immediate or simple answers. Even though there are organizational and pastoral challenges, especially at the diocesan and parish levels, I believe there are also new opportunities if we take the time and make the effort to listen.

I believe one way to look at the Church is through the lens of community development. In community development work two important questions to ask are: (a) who is *not* at the table?, and (b) why not?. The CCCB (2011) stated, "The voices of the adults of the Church of today call to be heard by the wider ecclesial community. They long for a relevant and respectful response" (p. 139 (sec. 91)). This statement implicitly could be interpreted that there were voices which were not being heard. Perhaps there is a need to open up spaces to engage in



respectful conversations which include new and different voices and perspectives regarding adult religious education practice in the Canadian Catholic context. This may lead to new efforts which are responsive to the needs of different groups of adults. The stakes are high. As part of my academic work over the years, I continually reviewed many Canadian diocesan and parish websites from coast to coast. Based on reviewing these websites and other Canadian Catholic media and websites, these types of conversations are already happening in many places in different ways and at different levels.

Despite the magnitude and myriad of significant challenges facing parish life and communicating and transmitting the Christian faith in contemporary Canadian society, it is important to remain hopeful. Saint Paul exhorted and encouraged the Church at Corinth to excel in their work, that it was not in vain (1 Cor. 15:58 (New Revised Standard Version)).

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## Appendix A

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*Note: Several of the secondary published documentary sources are also listed in the references.*

*These documents served a dual purpose in the study: (a) reference source which was cited in the study, and (b) sources of data.*

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## Appendix B

### Script for Informal Initial Contact

**Title:** *The Training and Development of Adult Religious Educators and Leaders for Canadian Catholic Parishes: A Historiographical Analysis 1983 to 2011 and Future Directions*

Prospective participants will be initially contacted informally either by telephone, e-mail, or in person. Through being a member of the Catholic community, I am either acquainted with a prospective participant or aware of their reputation and leadership role in the enterprise of parish-based adult religious education. Allowing for flexibility, depending on the prospective participant, the initial approach to each prospective participant will be tailored based on the following elements of the initial contact.

- Based on Sections 3.1 and 3.2 of the Application for Behavioural Research Ethics Review, summarize and briefly describe to prospective participants the key elements of the nature, purpose, objectives and procedures of the study, and its potential significance.
- Explain to prospective participants the inherently interdisciplinary nature of my academic work which integrates aspects of educational leadership and administration, Catholic theology, and adult education and learning.
- Inform prospective participants that one member of my Ph.D. Advisory Committee is a recognized Catholic theologian who is a faculty member of St. Thomas More College.
- Explain to prospective participants why I am using the term “religious education” in the study as opposed to catechesis or faith formation. The U of S is a secular university and I am writing for a broadly based audience that includes non-Catholics who may not be familiar with Catholic terminology. The term religious education is widely used at international levels in scholarly writing, and incorporates the great variety of activities, practices and processes of education and learning related to the religious dimension.
- Share with prospective participants why I became interested in the topic of my study and a brief overview of my qualifications, experience, and training to conduct this study.
- Explain to prospective participants that through my Master of Education (Educational Administration) and now my Doctor of Philosophy (Educational Administration) programs, I have focused on the Catholic Church’s educational mission through the lens of educational administration and leadership with respect to communicating and passing on the Catholic faith with a concentration on community-based adult religious education such as in parishes.
- If requested by any prospective participant, I will provide my curriculum vitae. Or, if considered appropriate, I will offer to provide my curriculum vitae to a prospective participant.
- Explain to prospective participants they were selected because of their expertise and publicly

known leadership role(s) in the enterprise of parish-based adult religious education in the 1983 to 2011 period, and due to their experience, would likely have a historical perspective and commentary about the training and development of adult religious educators and leaders for the parish milieu during this period.

- Explain to prospective participants *why* and *how* their participation in the study will contribute to furthering knowledge in this area.
- Based on Section 4.7 of the Application for Behavioural Research Ethics Review, explain to prospective participants my presumptive protocols for confidentiality and why these protocols were decided upon. Relatedly, ask prospective participants what their individual confidentiality requirements are, and if they would like their contribution to the study to be acknowledged in some manner.
- Explain to prospective participants that their participation is voluntary, and that they may decline the invitation to participate in the study without explanation, or that they may withdraw from the study for any reason, at any stage in the study, without explanation or consequence.
- If a prospective participant informally consents to participate in the study, explain that a formal letter of invitation and a sample of the Participant Consent Form will be sent to them.

*Appendix C*  
**Letter of Invitation**

Date, 2016

Inside Address

Dear \_\_\_\_\_:

Thank you for consenting to be interviewed for my doctoral research study entitled *The Training and Development of Adult Religious Educators and Leaders for Canadian Catholic Parishes: A Historiographical Analysis 1983 to 2011 and Future Directions*. I look forward to interviewing you in the near future.

I am a Ph.D. Candidate in the Department of Educational Administration at the University of Saskatchewan. Through my Master of Education (Educational Administration) program, and now Doctor of Philosophy (Educational Administration) program, I have been focusing on the Catholic Church's educational mission through the lens of educational administration and leadership with respect to communicating and passing on the Catholic faith with a concentration on community-based adult religious education such as in parishes.

For your review, a sample of the Participant Consent Form is included with this letter (Appendix [see Appendix D]). When we meet for the interview, I will bring two copies of the Participant Consent Form to be signed, and you will be given one signed copy. The Participant Consent Form outlines the essential elements of my study.

Your participation in this study is voluntary.

If you have any questions or concerns, please do not hesitate to contact my supervisor or me. My supervisor, Dr. Michael Cottrell, can be contacted at 306-966-7690 or michael.cottrell@usask.ca. I can be contacted at 306-933-2373 or 306-361-1155 or lucille.otero@usask.ca.

Thank you for your kind consideration of my request for you to participate in my study.

Respectfully yours,



Lucille Otero

## Appendix D

### Participant Consent Form

Dear Participant:

You are invited to participate in a research study entitled *The Training and Development of Adult Religious Educators and Leaders for Canadian Catholic Parishes: A Historiographical Analysis 1983 to 2011 and Future Directions*. Please read this form carefully, and feel free to ask questions you might have.

**Researcher:** Lucille Otero, Ph.D. Candidate, Department of Educational Administration, University of Saskatchewan, 306-361-1155, lucille.otero@usask.ca

**Supervisor:** Dr. Michael Cottrell, Department of Educational Administration, 306-966-7690, michael.cottrell@usask.ca

**Purpose and Objectives:** The purpose of this proposed study is to explore what initiatives and structures to facilitate the training and development of adult religious educators and leaders for Canadian Catholic parishes have been attempted and implemented in the 1983 to 2011 period. Given the great diversity of contexts and circumstances of Canadian Catholic parishes, the objectives of this study are to analyze and assess what initiatives and structures have worked or not worked to train and develop adult religious educators and leaders for the parish milieu, and to identify potential structures to train and develop adult religious educators and leaders that may be appropriate for different contexts and situations that are responsive to local circumstances and needs, either currently or in the future.

**Procedures:** This historical study has two phases of data collection. In the first phase, historical data from different types of historical documentary sources for the 1983 to 2011 period pertinent to the training and development of adult religious educators and leaders was collected which was followed by an interim analysis of the collected data. The preliminary findings in the first phase of data collection and analysis have been reviewed. Based on these preliminary findings, to supplement and to compare with the documentary data, in person individual interviews will be conducted to obtain data from the study's participants. Participants were selected based on their expertise and publicly known leadership role(s) in the enterprise of parish-based adult religious education in the 1983 to 2011 period. These participants, due to their experience, are deemed to have a historical perspective and commentary about the training and development of adult religious educators and leaders for the parish milieu during this period. The interview will take approximately 45 to 60 minutes, and will be conducted at a time and location of your choice. The interview questions will be sent to you prior to the interview date so that you have adequate time to consider your responses if you so wish to do so. With your permission, the interview will be digitally (audio) recorded, and you may request to have the digital recorder turned off at any time. The interview will then be transcribed and a transcript will be sent to you in order for you to add, alter or delete information from the transcript as you see fit, and then you will be asked to sign a transcript release form.

/page 2...



**Potential Risks:** There are no known or anticipated risk(s) to you by participating in this study.

**Potential Benefits:** The goal of this study is to achieve greater clarity and insight regarding various approaches to training and developing adult religious educators and leaders for the parish milieu.

**Use of Data:** The data from this study will be reported only in aggregate form so that it will not be possible to identify individual participants. No individual participant will be directly quoted and data will not be linked specifically to a participant except, only when deemed absolutely necessary by the researcher, to indicate if they are a clergyman or lay person, and this only will be done in a generic manner. The findings will be presented in such a way that will not reflect unfavorably on any of the participants. If, for any reason, you have second thoughts about your responses throughout the interview, please contact me to have your responses removed from the data base. The results of this study may be disseminated in my dissertation, in publications, and at conferences. Knowledge gleaned from the study may also be used for further or continuing research in the area.

**Storage of Data:** Notes, interview transcripts, and digitally (audio) recorded interviews will be securely stored in the Department of Educational Administration for five years in keeping with University of Saskatchewan guidelines. Following that time, all data forms will be destroyed.

**Confidentiality:** All reasonable effort will be made to ensure your confidentiality. You will not be directly quoted nor will any information be provided that may identify you. Except for distinguishing between Catholic clergy (all male) and lay persons (male or female), only when deemed absolutely necessary by the researcher, no other identifying characteristics such as your age, your past or current office(s) or role(s) in the Church, or location will be provided. Given that participants will come from different Catholic entities or organizations across Canada significantly improves the level of confidentiality. None of these entities or organizations will be specifically identified, nor their general or specific geographical location within Canada. The signed participant consent forms will be stored separately from data records. Only the researcher will know the identity of the participants in the study.

**Right to Withdraw:** Your participation is voluntary and you can answer only those questions that you feel comfortable with. You may withdraw from the study for any reason, at any time without explanation or consequence. Your right to withdraw data from the study will apply until data has been summarized. After this it may not be possible to withdraw your data.

**Follow-up:** Upon the completion of the study, a written summary of the results of the study and/or the whole dissertation will be offered and provided to you, whatever you so wish.

/page 3...

**Questions:** If you have any questions concerning the study, please feel free to ask at any point by contacting the researcher or the supervisor at the contact information provided above. You are also free to contact the researcher or the supervisor at the contact information provided above if you have questions at a later time. You will be informed of any new information that may affect your decision to participate in the study if/as it arises. This study was approved on ethical grounds by the University of Saskatchewan Behavioural Research Ethics Board. Any questions regarding your rights as a participant may be addressed to the Research Ethics Office toll free at 1-888-966-2975 or [ethics.office@usask.ca](mailto:ethics.office@usask.ca).

**Consent to Participate:** I have read and understood the description provided above. I have been provided with an opportunity to ask questions and my questions have been answered satisfactorily. I consent to participate in the study described above, understanding that I may withdraw this consent at any time. A copy of this consent form has been given to me for my records.

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Name of Participant

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Date

---

Signature of Participant

---

Signature of Researcher

## Appendix E

### Interview Format and Questions

**Title:** *The Training and Development of Adult Religious Educators and Leaders for Canadian Catholic Parishes: A Historiographical Analysis 1983 to 2011 and Future Directions*

**Note:** Utilizing a semi-structured interview format and a general interview guide approach, all the participants essentially will be asked the same interview questions. However, this format and approach allows for flexibility in framing the interview question and using probing prompts to obtain more specific and in-depth information to understand the participant's experience and views. Questions One and Two have a background statement which will be tailored for the individual participant to set the context of the question. Each participant will be sent their potential interview questions, including the background statement, prior to the interview date so that they will have adequate time to consider their responses if they so wish to do so. Also, all the participants will be familiar with the three documents referred to in the background statements:

- *The General Directory for Catechesis*,
- *On Good Soil: Pastoral Planning for Evangelization and Catechesis with Adults*, and
- *The Missionary Dynamic of the Parish Today*.

#### Question One

**Background to Question One:** As expressed in key publications issued by the Canadian Conference of Catholic Bishops, most recently, *On Good Soil: Pastoral Planning for Evangelization and Catechesis with Adults*, the work of adult religious education in Canadian Catholic parishes faces several institutional and human resource challenges. In particular, leadership training and development in adult religious education has been a significant longtime concern. Although the difficulties that dioceses and parishes may face in providing adult religious education are not the same everywhere nor exist everywhere within Canada or at the same time, there may be barriers or challenges to facilitate the training and development of adult religious educators and leaders for the parish milieu.

In your experience, what type of issues and roadblocks have you faced? Or conversely, what successes have you had with respect to the training and development of adult religious educators and leaders, that is, what has worked, and why?

*Probing prompts:*

- institutional or organizational factors
- financial factors
- human resources for adult religious education (paid or voluntary service)
- access to human and other types of resources to support the training and development of adult religious educators and leaders, for example, theological institutions
- emphasis on religious education for children (sacramental preparation) and youth

## Question Two

**Background to Question Two:** The Canadian Conference of Catholic Bishops offered its reflections on the role of the parish in contemporary Canadian society in *The Missionary Dynamic of the Parish Today* indicating parishes may have to find new approaches in different areas of parish life, one of these being religious education. However, several distinguished Canadian Catholic leaders and theologians have raised the question if the traditionally structured and organized parish is useful or even has a future. They have implied there is a need for a change in mind-set about the purpose of the parish and for new models of parish life. They have also suggested that major changes in parish life are certainly on the horizon, and noted that major changes and reorganization have already happened in some places. This may have implications for the training and development of adult religious educators and leaders for the parish milieu.

What is your general reaction or response to this statement?

*Probing prompts:*

- vision of the Church that sees the parish as community of communities
- type of leadership training and development parish leaders may need to advance or foster adult religious education in the parish milieu

## Question Three

In light of the conversation that we have just had, do you have any ideas or suggestions on how to move forward with respect to facilitating the training and development of adult religious educators and leaders for Canadian Catholic parishes?

*Probing prompts:*

- potential strategies and models to facilitate the training and development of adult religious educators and leaders and their actualization
- strategies to foster parish renewal and the work of adult religious education
- strategies for organizational culture change with respect to adult religious education

## At Conclusion of the Interview

Is there anything you would like to add to what you have already shared?  
Is there anything you would like to ask?

*Appendix F*  
**Transcript Release Form**

Title: *The Training and Development of Adult Religious Educators and Leaders for Canadian Catholic Parishes: A Historiographical Analysis 1983 to 2011 and Future Directions*

I, \_\_\_\_\_, have reviewed the complete transcript of my personal interview in this study, and have been provided with the opportunity to add, alter, and delete information from the transcript as appropriate. I acknowledge that the transcript accurately reflects what I said in my personal interview with Lucille Otero. I hereby authorize the release of this transcript to Lucille Otero to be used in the manner described in the Consent Form. I have received a copy of this Data/Transcript Release Form for my own records.

\_\_\_\_\_  
Name of Participant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Signature of Researcher

Appendix G

**International Consultations on Adult Religious Education**

1. London, England (1988)  
*Becoming Adult Christians*  
  
Chafe, J. (1989). International consultation: Adult religious education in the English speaking world. *Caravan*, 2(9), 15.
2. Montreal, Canada (1990)  
*Under Northern Lights: Education for Justice, Peace and Integrity of Creation*  
  
Green, C. (1990). Under northern lights: Second international consultation on adult religious education. *Caravan*, 4(16), 1–3.
3. Dublin, Ireland (1992)  
*Unfolding the Hidden Options: Adult Religious Education Serving Life or Death?*  
  
Shore, A. (1993). A report from the third international consultation on adult religious education. *Caravan*, 7(26), 11.
4. Ottawa, Canada (1995)  
*Models and Structures for Adult Religious Education and Catechist Formation for this Ministry*  
  
Biyne, G. M. (1995). Fourth international consultation on adult religious education meets in Ottawa. *Caravan*, 9(36), 6–7.
5. Jacksonville, Florida, USA (1997)  
*Adult Formation for Social Transformation: On the Eve of the Next Millennium*  
  
Chafe, J. (1997). Fifth international consultation on adult religious education: Adult formation for social transformation: On the eve of the next millennium. *Caravan*, 11(44), 5, 14.  
  
International Forum on Adult Religious Education. (1998). Models for adult formation for social transformation: Excerpt from the report of the fifth international consultation on adult religious education. *Caravan*, 12(46), 3.

6. Hyderabad, India (1999)  
*Vision of Evangelization and Adult Catechesis in the General Directory for Catechesis: Implications for Practice in Contemporary Culture*  
  
Chafe, J. (1999). Report from the sixth international consultation on adult religious education. *Caravan*, 13(51), 8.  
  
Chafe, J. (2000a). International forum on adult religious education: Adult catechesis as the principal form of catechesis: Sharing from countries. *Caravan*, 13(53), 4–8.  
  
Chafe, J. (2000b). International forum on adult religious education: Initiatives in catechist formation: Sharing from countries. *Caravan*, 14(55), 4–5.  
  
Gordon, E. F. (1999). A kinder, gentler secularism? *Caravan*, 13(52), 1–3
  7. Bangkok, Thailand (2001)  
*Inculturation of Faith in Complex and Pluralistic Situations: Relevant Approaches for Adult Faith Formation*  
  
International Forum on Adult Religious Education. (2003). Seventh international consultation on adult religious education: Inculturation of faith in complex and pluralistic situations. *Caravan*, 16(65), 12–13.  
  
Minkiewicz, C. (2002). Carving a new vision of adult faith formation: International consultation on adult religious education, November 25 – December 5, 2001. *Caravan*, 16(62), 10–11.
  8. Ushaw, England (2003)  
*Witnessing to Christ: Implications for Adult Faith Formation in a World of Religious Pluralism*  
  
Campbell, S. (2003). Eighth international consultation on adult religious education: Witnessing to Christ: Implications for adult faith formation in a world of religious pluralism. *Caravan*, 17(67), 5–7.
- Note: *Caravan* ceased publication 2004.
9. Sierra Madre, Pasadena, California, USA (2005)  
*Gathered and Sent: Forming Adults for Mission in a Global Community*
  10. Santiago, Chile (2008)  
*The Word of God: Blessing and Task for Adult Formation Today*

*Appendix H*  
**Degree Level Programs**

THEOLOGICAL INSTITUTION	CREDENTIAL
St. Mark's College, University of British Columbia Vancouver	Graduate Certificate in Religious Education Graduate Diploma in Religious Education Masters of Arts in Religious Education
Newman Theological College Edmonton	Bachelor of Theology (90 credit units) Master of Religious Education
Saint Paul University Ottawa	Master in Religious Education Doctor of Ministry
University of St. Michael's College Toronto	Master of Religious Education Doctor of Ministry
Regis College Jesuit School of Theology at the University of Toronto	Doctor of Ministry
St. Augustine's Seminary of Toronto	Diploma in Lay Ministry (Post Bachelor's Degree) Master of Religious Education



*Appendix I*  
**Non-degree Level Programs**

THEOLOGICAL INSTITUTION	CREDENTIAL
St. Mark's College, University of British Columbia Vancouver	Certificate in Catholic Studies
Newman Theological College Edmonton	Certificate in Catechesis I/II Certificate in Religious Education Certificate in Catholic Studies <i>Various aspects of the Catholic faith</i>
Campion College, University of Regina Regina	Certificate in Pastoral Studies
St. Peter's Seminary London	Certificate in Pastoral Ministry
Saint Paul University Ottawa	Certificate in New Evangelization
Concordia University Montreal	Certificate in Pastoral Ministry
Atlantic School of Theology (Ecumenical) Halifax	Diploma in the New Evangelization
Queen's College, Faculty of Theology (Anglican) <i>Roman Catholic Stream</i> St. John's	Diploma in Theology and Ministry

## Appendix J

### Key Church Documents

#### Regarding Primacy of Adult Religious Education and the Parish as Key Venue

DOCUMENT	ADULT RELIGIOUS EDUCATION	PARISH
<i>General Catechetical Directory</i> (SCC, 1971)	Shepherds of souls . . . should also remember that catechesis for adults, since it deals with persons who are capable of an adherence that is fully responsible, must be considered the chief form of catechesis. All the other forms, which are indeed always necessary, are in some way oriented to it. (para. 20)	
<i>Catechesi Tradendae</i> (John Paul II, 1979b)	I am referring to the central problem of the catechesis of adults. This is the principal form of catechesis, because it is addressed to persons who have the greatest responsibilities and the capacity to live the Christian message in its fully developed form. . . . Thus, for catechesis to be effective, it must be permanent, and it would be quite useless if it stopped short at the threshold of maturity. (para. 43)	The parish community must continue to be the prime mover and preeminent place for catechesis. . . . That is why every big parish or every group of parishes with small numbers has the serious duty to train people completely dedicated to providing catechetical leadership. (para. 67)
<i>Christifideles Laici</i> (John Paul II, 1988)	We all ought to be aware of the “rights” that each baptized person [adult] has to being instructed, educated and supported in the faith and the Christian life. (para. 34)	The <i>Parish</i> which has the essential task of a more personal and immediate formation of the lay faithful. . . . The parish is called to instruct its members in hearing God’s Word, in liturgical and personal dialogue with God, in the life of fraternal charity, and in allowing a more direct and concrete perception of the sense of ecclesial communion and responsibility in the Church’s mission. (para. 61)
<i>Adult Catechesis in the Christian Community</i> (ICC, 1990)	A fully Christian community can exist only when a systematic catechesis of all its members takes place and when an effective and well-developed catechesis of adults is regarded as the <i>central task</i> in the catechetical enterprise. (para. 25)	The <i>parish</i> has “the essential task of a more personal and immediate formation of the lay faithful”. (para. 61)
<i>General Directory for Catechesis</i> (CC, 1997)	Catechesis for adults, since it deals with persons who are capable of an adherence that is fully responsible, must be considered the chief form of catechesis. All the other forms, which are indeed always necessary, are in some way oriented to it. (para. 59)  The <i>organizing principle</i> , which gives coherence to the various catechetical programmes offered by a particular Church, is attention to adult catechesis. (para. 275)	The parish is, without doubt, the most important locus in which the Christian community is formed and expressed. (para. 257)  As far as catechesis is concerned, [there are no] alternatives to the parish since this is the educational community to which reference must be made by catechesis. (para. 262)