

**Expanding Learning in Clergy Leadership  
Formation in an Anglican Church Province in  
Southern Africa: A Critical Realist Study**

**A thesis submitted in fulfilment of the requirements for the  
degree of**

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**by**

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## ABSTRACT

The focus of this study was to investigate the kind of learning that happened when participants involved in clergy leadership formation programmes and activities in the Anglican Church of Southern Africa (ACSA) engaged in their responsibilities as a collective. Further, the research sought to explore collaborative and transforming practices in ACSA clergy leadership formation programmes and activities which could be expanded through learning.

The study is premised on an investigation of the historical foundations of Christian leadership formation processes which sought to establish clergy leadership formation models relevant to ACSA (the context of the study) from inception (1848) to date (2017). This entailed investigating how the developments which have happened in the church from its inception in the New Testament times through the Medieval and Reformation periods, have contributed to the emergence of distinct Christian leadership formation models which have formed the basis of clergy leadership formation in ACSA. Accordingly, the study highlighted key issues relating to clergy leadership formation which are discernible in the different historical phases of the life and work of the church with the objective of establishing how ACSA, through expansive learning, could transform her current clergy leadership formation model(s) towards collaborative and transforming practices.

The concept of expansive learning, drawn from Cultural Historical Activity Theory (CHAT), was used in the study as a methodological tool to create an environment where research participants (formators) from several dioceses would engage in collective work activities which would surface contradictions relating to how clergy leadership formation programmes and activities were understood and facilitated in ACSA. In response to the surfaced contradictions, the study engaged research participants in Change Laboratory Workshops whose goal was to transform the organisation (ACSA) in two particular ways: empowerment of participants (formators) with conceptual tools relevant to their responsibilities in clergy leadership formation programmes and activities in ACSA, and improvement of organisational cultural practices, that is, the manner in which ACSA ought to conceptualise, design, plan, facilitate and manage clergy leadership formation programmes and activities. The latter brought into the discourse the need for participants (formators) to select and employ methodologies, methods, approaches and resources relevant to the southern African context

where ACSA is located even though the study also acknowledged the influence of other Anglican Church contexts on what happened at the local level.

In order to decipher meaning out of investigated phenomena about clergy leadership formation in ACSA, the study employed the critical realist “underlabouring” philosophy advanced by theorists such as Bhaskar to surface underlying mechanisms that exist at the level of the “real” in order to understand the causes of particular events and experiences as they manifest in the “actual” and “empirical” domains of the world, ACSA in the case of the study. In particular, the study engaged critically the opinion deliberated by critical realists concerning the interplay between structure and agency in relation to the responsibilities of the research participants (formators) in ACSA clergy leadership formation programmes and activities. For instance, the study had an interest in investigating why bishops (principal formators in ACSA) exercised their episcopal authority in the manner they do and why individual formators were concerned about particular issues which relate to the facilitation of clergy leadership formation in ACSA (agential reflexivity/subjectivity).

The study observed that, in the case of diocesan bishops, critical realists would argue that, by virtue of the authority which comes with their responsibilities (agency), they have the power to influence transformation of practices in clergy leadership formation in ACSA at any given point in time. The flip side of the discourse was also taken note of: that some bishops, for reasons known to themselves and their predecessors, are often reluctant to embrace new ideas relating to clergy leadership formation practices in their dioceses.

Further, through critical realist lens, the study concluded that Canons, Vision and Mission statements, Acts, and structures such as Synod of Bishops, Provincial Synod, ABoTE, Cott, and TfM structurally shape ACSA, thus providing the organisation with a stable ontology which ought to direct, regulate and control the manner in which clergy leadership formation programmes and activities were conceptualised, designed, planned, facilitated and managed. As such, the study had an interest in establishing what would happen, in relation to clergy leadership formation practices in ACSA, when these structures would have been activated? Beyond that, in view of the goal of the study, it was enquired how expansive learning processes could be helpful in responding to the research findings towards exploring collaborative and transforming clergy leadership formation practices in ACSA.

Drawing from the conceptual framework which was carved in the study on the basis of the theoretical tools (critical realism and educational leadership theory) and methodological tools (CHAT orientated concepts) undergirded by the Vygotskian theorisation of human consciousness development, the study concluded that clergy leadership formation is a collaborative activity which calls for the recognition, appreciation and utilisation of available expertise in ACSA and provision of a platform where participants (formators) could engage collectively on issues relating to their work with the objective of building each other up in knowledge and skills (expansive learning) towards realisation of the goals and objectives of the organisation. Diverse understandings (contradictions) of what needed to be prioritised in the facilitation of clergy leadership formation in ACSA would be considered as a positive rather than a negative.

Ultimately, through the use of inductive, abductive and retroductive modes of inference, the study modelled a transforming, transformational, transformative, embodied and incarnational model of clergy leadership formation which ACSA could consider using in future deliberations on the object of study particularly in relation to the key research findings across the case studies which were used in the study.

## DECLARATION

I declare that this thesis is my own work and that all other sources used or quoted have been fully acknowledged and referenced. I am submitting this work for the degree of Philosophy at Rhodes University. The work has not been submitted for a degree or examination at any other university.

Percy Chinganga

Signature .....

February 2019

## **LIST OF ACRONYMS**

ABOTE – ADVISORY BOARD ON THEOLOGICAL Education

ACC – Anglican Consultative Council

ACSA – Anglican Church of Southern Africa

Aint – ACSA interview

Cfg – Cott focus group

AS – Activity Theory

ASF – Anglican Student Federation

CHAT – Cultural Historical Activity Theory

CHE – Council on Higher Education

CLWs – Change Laboratory Workshops

Cott – College of the Transfiguration

CPSA – Church of the Province of Southern Africa

CR – Community of the Resurrection

CUC – Church Unity Commission

DoHET – Department of Higher Education and Training

DWR – Developmental Work Research

ELC – Expansive Learning Cycle

Fedsem – Federal Theological Seminary

HEQC – Higher Education Quality Committee

IACs – Independent African Churches

IMC – International Missionary Council

LBDQ – Leader Behaviour Description Questionnaire

LDP – Leadership Development Programme

LPC – Least Preferred Co-worker

MKO – More Knowledgeable Other

NQF – National Qualification Framework

PHEI – Private Higher Education Institution

SACTE – South African Council for Theological Education

SAQA – South African Qualifications Authority

SPCK – Society for Promoting Christian Knowledge

SSM – Society of the Sacred Mission

TEAC – Theological Education for the Anglican Communion

TEEC – Theological Education by Extension College

TfM – Training for Ministry

Unisa – University of South Africa

ZPD – Zone of Proximal Development

ZOU – Zimbabwe Open University

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# CHAPTER ONE: INTRODUCTION TO THE STUDY

## 1.1 PERSONAL HISTORY AND MOTIVATION

The motivation to do research on clergy leadership formation in the context of the church, ACSA in particular, has connections with my life experiences in the following ways:

(i) **My parentage**: My parents were devout Anglican Church members with an insatiable desire to ensure that their children received the best education they could afford, despite the meagre financial resources at their disposal. Growing up under their care and nurturance in rural Zimbabwe, and being the first-born child of seven children, I developed an aptitude for leadership which found expression in a number of responsibilities which I shouldered at home, school and church. At home, I had the responsibility of looking after my siblings and the homestead when our parents were at my father's workplace which was about 80 kilometres away from our village. He was a teacher in a secondary school owned by the Roman Catholic Church and managed by the Marist Brothers. The manner in which he managed his teaching responsibilities and showed leadership in designated extra-curricular activities – such as coaching the school soccer teams which, many a time, won coveted accolades – made an indelible mark on my holistic formation. My mother, a “specialist” in subsistence farming, tilled the small allocation of land that belonged to the family with diligence and an unquestionable commitment to provide for the family by utilising fully the means and provisions at her disposal. That exposure, through observation and practical engagements in some of the activities that made up her routine, helped to inculcate a sense of responsible citizenship in me.

(ii) **My schooling**: I had the privilege of holding positions of responsibility at all my academic levels of development. In all instances, these entailed assisting with school administration and extra-curricular activities. The privilege of learning in a Roman Catholic secondary school for six years was a transforming experience in a holistic sense. The disciplined daily routine, punctuated by activities of a varied nature which included cleaning our dormitories and their surroundings, chapel prayer, meals, classroom engagements and sporting activities, laid the foundation for a life after school characterised by a sense of personal responsibility, accountability, determination, unreserved service, and selflessness in

all life engagements. The biggest occasion out of these experiences was my promotion from the position of House Sports Prefect to that of 2<sup>nd</sup> House Prefect when I was in my final phase of secondary school. Besides the excitement of being elevated to a “prestigious” position of responsibility in the life and work of the school, there was the humility with which I felt that the school had bestowed trust on me which I vowed not to betray by all means possible. As such, from as early as that stage, I valued taking time to reflect on life experiences so as to decipher meaning out of encounters, developments, or occurrences in context which I believe is a critical attribute of leadership of any type; clergy leadership in the case of this study.

**(iii) Church involvement:** As I have already alluded to above, my parents were devout Anglicans in both membership and discipleship. They were actively involved in leadership responsibilities at their local parish and in the missionary activities of the church at the diocese level. In the context of a village, we (children) were naturally taken on board in church worship activities and assistance with some of the routine responsibilities such as cleaning the church building, planting flowers in the surroundings of the church building, teaching Sunday school and others. Unfortunately, when I enrolled at the Roman Catholic school, because I was Anglican, I was not allowed to participate actively in church routine activities such as altar serving. However, the ability to manage and “survive” in a context or environment different from what I was used to – religiously speaking – sowed seeds of ecumenism in me which is fundamental in clergy leadership practices. That spilt into six years of university where church activities were largely ecumenical even though denominations could worship separately on Sundays.

**(iv) Working experience:** Upon completion of my first two university degree programmes, by fate or luck, I had the privilege of being deployed in two Anglican secondary schools as a teacher, a position which also entailed leadership responsibilities in a number of the other aspects of life and work of the schools. That gave me an opportunity to teach and lead within the ethos of the Anglican Church. The real challenge for my professional life as a teacher came in 1999 when I was re-deployed in a peri-urban secondary school which was situated in a mining community, in the precincts of the Manica border with Mozambique. The context presented a number of challenges in the facilitation of learning and management of the school: absenteeism, consumption of drugs, and learner and parental *laissez faire* attitudes toward school. I was challenged to dig deep into the values about qualitative education and teacher reflexive practices which had been inculcated in me in my formation to that point in

time. By divine plan or mere coincidence, in 2003 I transferred to a Roman Catholic School situated in town (Mutare). This was an interesting development in my professional life and formation as a teacher and leader. It felt like I had completed a circle of life experiences. The adjustments which I was required to make in terms of observing school ethos as I changed schools added value to my developing ecumenical perspective and awareness of the imperativeness of context in any engagement. The relocation to an urban setting also provided me with an opportunity to serve in church related responsibilities beyond membership. My commitment in this regard was observed with a request from the leadership of my parish to lead the Education Committee of the parish. This added excitement and more responsibility in my Christian identity formation, interfaced with my teaching profession.

Another important development which I experienced in this period of my life was an opportunity to teach on a part-time basis at the Zimbabwe Open University (ZOU), a course entitled “*Organisational Development in Education*” in their Master’s degree programme. At that point, it felt like I had reached the zenith of my professional life as I was challenged to facilitate deliberations on cumbersome issues in the field of education such as leadership, management, policy making and implementation, and change related issues in education from an organisational perspective.

In 2004, I made a decision to turn my whole focus towards serving in ordained ministries, which meant resigning from the Ministry of Education. I was made a deacon at the end of that year, an occasion when I received the bishop’s *charge* which I discuss in Section 8.2.1. The mandate of the *charge* had resonated with what I had come to value in life: selfless service to God’s people and the whole created order. The following year I was sent to South Africa for a year of theological education, spiritual and ministerial formation (the subject of the object of the study) at The College of the Transfiguration where, a year later, I returned and remain to this day a teacher.

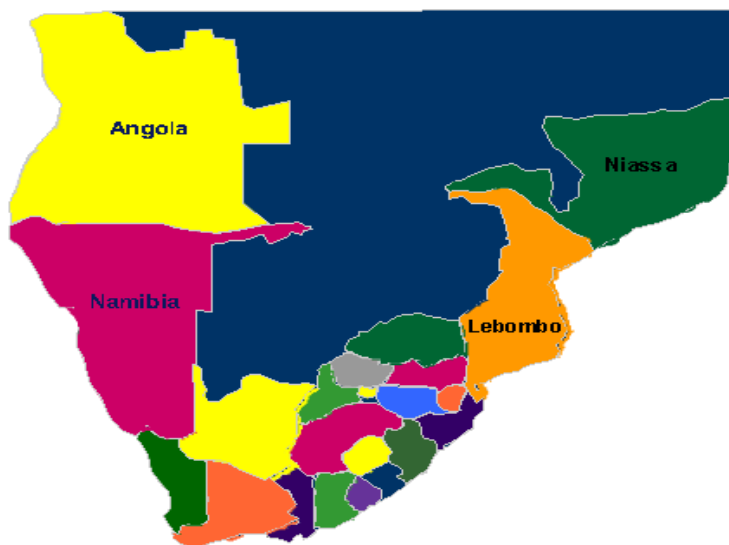
The privilege of being a theological educator, spiritual and ministerial formator in an Anglican Church seminary was the real zenith of my life experiences. Further, the set of courses which were allocated to me to facilitate all pointed to a quest for authentic liberation, transformational and transformative approaches to matters relating to development, undergirded by a theological discourse. Because of my background in education, I sought possibilities to further my academic profile. In 2008 I got to know and made enquiries about

the Educational Leadership and Management programme at Master’s degree level which is offered by Rhodes University through the Faculty of Education. The following year I enrolled for the programme which, a year later, earned me a Master’s degree in Educational Leadership and Management. Thereafter, with the support and encouragement of Professor Hennie Van Der Mescht, my mind was set to do PhD research in this subject with an interest to pull together education and church experiences of leadership.

## 1.2 RESEARCH CONTEXT

### 1.2.1 Geographical location

What is the Anglican Church of Southern Africa (ACSA) today was established as the Church of the Province of Southern Africa (CPSA) with the arrival of Robert Gray, her founder, in Cape Town in February 1848. She consisted of “the British Colony of the Cape of Good Hope and its dependencies, together with the Island of St. Helena” (Suggit & Goedhals, 1998, p. 1). CPSA (ACSA) expanded to include “territories known then as Basutoland, Bechuanaland, Southern Rhodesia, Lebombo, Damaraland which we now know as Lesotho, Botswana, Zimbabwe, Mozambique, and Namibia” (*ibid.*, p. 1). Following the founding of the Church of the Province of Central Africa (CPCA) in 1963, comprising of Botswana, Malawi, Zambia and Zimbabwe, ACSA now constitutes 28 dioceses in countries including Angola, Lesotho, Mozambique, Namibia, South Africa and Swaziland (*ibid.*, pp. 1-2) as indicated in Figure 1.1 below.



*Figure 1.1: Southern African map showing the dioceses which constitute ACSA*

## 1.2.2 Facilitation of clergy leadership formation in ACSA

### 1.2.2.1 Holistic approach

Leadership formation for the ordained ministry in ACSA comprises theological education (cognitive), spiritual nurturing (spirituality) and ministerial training (practical skills) (Anglican Prayer Book, 1989; Moyo as cited in Pobee & Kudadgie, 1990; Lindbeck as cited in Astley, Francis, & Crowder, 1996; *ACSA Constitution and Canons*, 2014, Act VI). Critical in this process is the understanding that formation is an “on-going process of the person’s actions and habits being continually transformed (morphed)” (Pettit, 2008, p. 21). What is suggested here is that the goal of clergy leadership formation in ACSA is transformation which, in other words, could be understood as a lifelong learning experience (Mezirow, 2000).

Implied in the above is the requirement to facilitate clergy leadership formation in line with the goals and objectives of ACSA. At his consecration, the ACSA Archbishop at the time when the study was done (Archbishop Thabo Makgoba) alluded to this view by stating that the ACSA was committed to forming clergy leaders who would:

- be deeply ethical, moral, and visionary;
- serve the wider community (beyond the walls of the Church) including business, government, and other parts of society that seek moral, ethical, and spiritual direction in dealing with injustice and inequality. (*Report on development of ACSA Vision and Mission Statement*, September 2010)

What is emphasised in the statement is that ACSA understands clergy leadership formation in holistic terms, the realisation of which would require collaborative facilitation between different organisations and formators<sup>1</sup> involved in the practice.

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<sup>1</sup> Formator in this study is an umbrella term used to refer to those who facilitate leadership formation programmes in ACSA. These include diocesan Bishops, Deans of Studies, Theological educators, Spiritual and Ministerial formation directors and trainers.

### 1.2.3 Existing collaboration in clergy leadership formation in ACSA

Drawing from data gathered in the exploratory phase of the study, five structures<sup>2</sup> (what Engeström calls activity systems<sup>3</sup>) emerged in ACSA clergy leadership formation practices and were categorised in the study under two case studies, presented next.

#### 1.2.3.1 ACSA ministry and training case study

The ACSA ministry and training case study is composed of two activity systems, namely, Advisory Board on Theological Education (ABoTE) and Diocesan formators activity system (refer to 3.2.3; Figure 3.1).

Canonically, theological education, a critical aspect of clergy leadership formation practices in ACSA, is overseen by ABoTE. The board reports to the Synod of Bishops and Provincial Synod<sup>4</sup>. The function of the board, as stipulated in Act XIV/5 of the ACSA Constitution and Canons (2014, p. 169), is triple fold:

- i) to advise Cott and dioceses on matters relating to theological education, pre- and post-ordination;
- ii) to ensure Cott and all leadership formation schemes in ACSA keep abreast with developments in theological and pastoral thinking and practice;
- iii) to endeavour to establish basic standards for the facilitation of leadership formation for ordained ministry in ACSA in dialogue with South African Council for theological education (SACTE) where required.

In addition, but not necessarily presented as a function in the ACSA Constitution and Canons (2014), ABoTE is accorded the privilege of visiting a diocese or provincial institution involved in the facilitation of clergy leadership formation programmes:

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<sup>2</sup> Structure, also referred to as social systems in this study, includes such factors as social class, religion, gender, customs, policies, etc which influence people and the opportunities which may be at their disposal for personal or collective transformation in context. This is a critical realist perspective which is elaborated in Chapter Two of the study.

<sup>3</sup> Leontiev (1981, p. 46) defines an activity system as “a minimum unit of analysis; ... an actual, identifiable activity as opposed to a generic notion of human activity ... a system with its own structure, its own internal transformations, and its own development”.

<sup>4</sup> Provincial Synod in the Anglican Church refers to a Council made up of representatives from Church structures across the diverse groups of people making up the Church (denomination) which meets from time to time to deliberate Church governance matters. Synod of Bishops refers to a Council of bishops which meets from time to time to deliberate Church matters which do not necessarily require involvement of the laity (non-ordained).

where invited by the relevant authority (which shall include the Visitor of an institution) or failing this, when instructed to do so by the Synod of Bishops ... (to) review the goals, activities and achievements of a theological college, institute or training scheme. The Board shall report on such visits to the Synod of Bishops and the College, institution or programme concerned. (*ACSA Constitution and Canons*, 2014, Act XIV/6, p. 169)

ABoTE members meet once every year for their deliberations.

The second activity system under the ACSA ministry and training case study is Diocesan formators activity system which I also refer to as training for ministry (TfM). Both names articulate concisely what the structure contributes in ACSA clergy leadership formation programmes and activities.

Acknowledging the reality and criticality of the diverse understandings and practices of clergy leadership formation in ACSA, the Synod of Bishops instituted TfM as a sub-committee of ABoTE. Fundamentally, TfM was understood as a platform in ACSA on which to engage issues relating to clergy leadership formation inter-diocesan. It was the practice that formators across ACSA assembled at Cott once a year to share and reflect on diverse experiences and insights on facilitation of clergy leadership formation; brainstorming inter-diocesan networking possibilities; attempting to reflect collectively on the prevailing clergy leadership formation practices in ACSA and the global Anglican Church (TfM Consultation notes, 2008).

Information which was gathered in the contextual profiling phase of the study indicated that TfM acknowledged the inevitability of diversity in the facilitation of clergy leadership formation in ACSA for a variety of contextual reasons. Elaborating on this view, a “listener”<sup>5</sup> at the 2012 TfM consultation gave an evaluation of the proceedings of the consultation as follows:

In the past we aimed at achieving uniformity as ACSA in terms of leadership formation in our Dioceses. I have come to realise that no uniformity will be achieved. As Dioceses we are diverse in terms of our needs and Diocesan visions. Each Diocese addresses its own needs and challenges peculiar to that Diocese. As long as we operate within the set parameters of our Church, diversity should not be a problem. (TfM consultation notes, 2012)

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<sup>5</sup> “Listener” – during TfM consultation sessions, delegates took turns to jot down notes on proceedings; noting points for further discussion or clarification by presenters and other observations. Those issues would be shared with the rest of the group at designated times in the consultation programme.

The same sentiment had been shared by a presenter at the TfM consultation of 2011. The participant had observed that dioceses in ACSA organised facilitation of clergy leadership formation in line with the diverse historical patterns which emerged with the advent of the Anglican Church in Southern Africa:

As the context of the Church changes, so does her needs and the ways of responding to those needs. A new context requires alternative styles of leadership to meet changed needs. The titles Bishop, Priest and Deacon remain the same, but the nature of the ministries they represent have changed over time. ... first, we must ask what kind of Church we envision in the next twenty to thirty years. Then we need to consider what kind of leaders we need to bring such a church to fruition. Finally, we need to ask what kind of formation is required for these leaders. (Presentation done at the 2011 TfM Consultation)

It was evident that TfM was rooted in collaborative learning activities. As such, TfM activities were a strong basis for Change Laboratory Workshops (CLWs) which were facilitated in the study towards multiple activity system collaborative facilitation of clergy leadership formation in ACSA.

Also categorised under Diocesan formators activity system is HOPE Africa, a para-church organisation in ACSA with a focus on social development which includes a leadership component. Hope Africa is aimed at developing and strengthening ACSA leadership capacity and practice (both ordained and non-ordained). Key areas of focus in HOPE Africa functions are public policy; justice and social empowerment issues; and lobbying and advocacy engagements ([http://www.hopeafrica.org.za/Poverty Dev.asp](http://www.hopeafrica.org.za/Poverty%20Dev.asp)).

In line with the objectives of ACSA Vision and Mission Statement (see Annexure 3.1), HOPE Africa states the following to show synergy with other clergy leadership formation structures in ACSA:

Our Church needs leaders who are able to give wisdom and guidance to the translation of the ACSA Vision into manageable objectives; leaders who will understand how best to take responsibility for the Vision; leaders who will motivate and energise the members of our church to participate in the achievement of the dream. Finally, we need leaders who will best be able to unlock the potential and latent energy of the people in our communities, parishes and dioceses. (HOPE Africa ACSA Leadership Development Proposal document, 2012, p. 2)

Chapter Eight deliberates the concerns around clergy leadership formation and clergy leadership practice raised in the quotation above, which reinforce a shared opinion across

activity systems involved in the subject about the need for a transformational, transformative, transforming, incarnated and embodied model of clergy leadership in ACSA.

### ***1.2.3.2 College of the Transfiguration (Cott) case study***

Three activity systems constitute the Cott case study, namely, Cott formation activity system, Cott experiential learning activity system, and Cott management activity system.

Cott formation activity system: Cott is the only residential theological seminary in ACSA where men and women who sense God's calling to serve within the structures of the Church as ordained or theologically informed people are enrolled for qualifications in theology. In addition to academic studies, Cott provides ordinands with an environment conducive to spiritual and ministerial formation. In other words, Cott offers holistic formation to future leaders for the Anglican Church and the world at large (Cott Prospectus, 2014; refer to Figure 5.2).

Cott experiential learning activity system - Cott experiential learning activity system is jointly facilitated by Cott management and HOPE Africa. The aim of the programme is to expose students (future priests in formation and training) to diverse ministerial contexts in ACSA and beyond. As articulated in the statement by HOPE in the previous section, the Cott experiential learning activity system envisions students (future priests) who are widely and critically informed about ordained ministry in the world and can, as a result of that exposure, embrace diversity and serve effectively in any context beyond those with which they are familiar (see Figure 5.4; Annexure 6.8).

Cott management activity system – The study considers this as the central activity system in the Cott case study as it encapsulates the conceptualisation, design, planning, organisation, facilitation and evaluation of all formation activities done at Cott (refer to Figure 5.1).

### **1.2.4 Summary**

The inclination to collaborate on clergy leadership formation programmes and processes in ACSA is evident in what was presented in Section 1.2.2 and 1.2.3 above. At the first level – through collective, mutual and democratic processes – is the establishment and promulgation

of two types of structural instruments<sup>6</sup> on clergy leadership formation in ACSA, which should be observed by all her dioceses. At the second level, in complementation of the first level, is located agency<sup>7</sup> with the responsibility of conceptualising, designing, facilitating, managing and evaluating clergy leadership formation programmes, processes and activities in ACSA. Above all, it would seem, participants who are involved in these deliberations and considerations share a common understanding of what clergy leadership formation entails in ACSA (refer to 1.2.2.1).

A superficial consideration of the above would suggest that ACSA is well set up for effective facilitation of clergy leadership formation programmes and activities. Contrastingly, a critical reading of the concerns raised in Section 1.2.3 suggests difficulties experienced by participants in their endeavours to work collaboratively in ACSA clergy leadership formation programmes and processes. In other words, what appears to be the case on the surface is not necessarily the reality experienced in ACSA clergy leadership formation practices. These contradicting circumstances characterising the context of the study create fertile ground for research.

### **1.3 PROBLEM STATEMENT**

In order to carve a problem statement for the study, I found it necessary to establish resources already available which inform the understandings and perspectives about clergy leadership formation in ACSA.

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<sup>6</sup> Section 1.2.2 and 1.2.3 discuss two types of structural instruments governing clergy leadership formation programmes and processes in ACSA which should be observed and utilised by all dioceses, namely: Constitution and Canons; and operational structures which, in the language of CHAT theorists as used in the study, are referred to as Activity Systems.

<sup>7</sup> Agency is understood in the study as change orientated action in a particular activity with the goal to transform some parts of the activity or its entirety. Thus, what people involved in collective work practices such as formators in clergy leadership formation programmes and activities in ACSA do, say or think about their practices is of paramount importance particularly in relation to expansive learning processes. In concurrence, Emirbayer (1997, p. 294) elaborated that people who exercise agency “enter into relationship with surrounding persons, places, meanings and events ... a dialogic process by which actors immersed in the *durée* of lived experience engage with others in collectively organised action contexts, temporal as well as spatial”. Implied in this understanding is the acknowledgement that those who exercise agency are people endowed with what Bhaskar (1993) and Archer (2003) call emergent causal powers which can either enable or constraint transformation in or of the phenomenon in question, clergy leadership formation in the case of this study (refer to Bhaskar (1993)’s “transformational model of human action” in Figure 2.3). As such, agency could better be understood as action, individual or collective, performed in context, implying that it is incarnated, embodied and not random, hence its interplay with structure in critical realist discourses as explained in Chapter Three, Eight and Nine.

Research done by Pityana and Pato<sup>8</sup> (1995) (senior formators in ACSA) revealed that leadership formation for ordained ministry in the dioceses which constitute ACSA took a variety of forms and that most people were being ordained entirely on the basis of such practices (Pato, 2001). In the analysis of their research findings, the two formators concluded that such practices were not in conformity with ACSA clergy leadership formation rules and regulations which, on one hand, recognise the existence and importance of diocesan clergy leadership formation schemes in their diversity (*Constitution and Canons of the Anglican Church of Southern Africa*, 2014, Act XIV), but on the other hand and more importantly, the requirement for those in formation to acquire, before their ordination, “a recognised qualification in theology from a University, or Theological College or institution recognised by the Synod of Bishops” (*ibid.*, Act VI). Revealed in the Canons is the fact that dioceses do not have the capacity to offer the latter, the reason why Pityana and Pato queried the common practice of a number of bishops in ACSA to ordain people every year on the basis of the former (Pityana & Pato, 1995; Pato, 2001).

As Rector at Cott in the period 2011-2014, Pityana maintained his critical stance about clergy leadership formation practices in ACSA through his regular bulletins to bishops and presentations done at important ACSA occasions such as synods. Pityana particularly disagreed with some of the bishops in ACSA who did not prioritise theological education, spiritual and ministerial formation of the future clergy at Cott, the only residential seminary in ACSA. Further, he lamented that, because of the unavailability of standardised and consolidated guidelines on clergy leadership formation in ACSA, the majority of students who were sent to Cott were insufficiently prepared for residential Anglican Church clergy leadership formation (TfM Consultation notes, 200, Modderpoort).

Ndungane had a catchy illustration to Pityana’s concern above. He explained that he understood Cott as a *hospital* and diocesan formation programmes (the so-called local schemes) as *clinics* without minimising the distinctive individual roles played by both in preparing ordinands for ordained ministry (*The Archbishop’s Charge*, September 2002, p. 32). He therefore acknowledged the value of both entities though he was of the opinion that it

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<sup>8</sup> Pato and Pityana’s views on clergy leadership formation programmes and processes in ACSA contributed towards *mirror data* which was used during CLWs in the study which is the preoccupation of Chapter Six.

would be a misnomer to ordain someone for Anglican Church ministry on the basis of diocesan training only.

In substantiation of their concerns, the three clergymen (Pityana, Pato and Ndungane) agreed on particular issues which, in their shared opinion, threatened the whole process of preparing men and women called to the ordained ministry in ACSA:

- i) sole recognition of diocesan training schemes would compromise residential training for ministry and yet with the dawning democratic dispensation in South Africa, clergy adequately prepared for ministry would be required to meet the needs of all people across the boundaries of social constructs;
- ii) basic doctrinal teachings, polity (history; Canon Law and governance) and ethos of the Anglican Church would be compromised as most dioceses lack facilitation capacity in these important aspects of the denomination;
- iii) *free range* model of formation would threaten the integrity of the denomination with *adulteration* as the likelihood of student reliance on or exposure to *anti-Anglicanism* resources with little qualified guidance were high. In the context of residential formation, such occurrences would be monitored by personnel with requisite knowledge in the field of theology and Anglicanism. (Suggit & Goedhals, 1998, p. 111).

Representing the other side of the discourse is Bishop Peter John Lee (ACSA, Diocese of Christ the King). His argument for full recognition of diocesan formation programmes is fundamentally two-fold:

- i) Residential formation costs are way above the affordability of most ACSA dioceses including the Diocese of Christ the King;
- ii) Diocesan formation programmes have more value at low cost compared to residential formation programmes. Whereas residential formation is more classroom based than *hands on* practice, diocesan formation programmes emphasise contextual application of theological tenets. In this scenario, the question therefore to ask is: what sort of product does ACSA desire in her ordinands? Would Theological Education by Extension (TEE) not be a better option as it necessitates students to study while at work in their home contexts? (Presentation done at Training for ministries Consultation, 2008).

The second point above was reiterated at the 2011 TfM consultation with both Pityana and Bishop Peter Lee in attendance. Pityana had not attended the 2008 consultation where the issue had initially been presented for deliberation. In response to the matter, Pityana argued that to prioritise diocesan formation programmes was tantamount to “training tribal priests”, contrary to the denominational convictions of the Anglican Church. Delegates in attendance at the consultation had been divided on the matter which never got resolved.

Following up the consultation deliberations, Pityana and Bishop Peter had exchanged what the former referred to as *love letters*. Both remained resolved on their perspectives of the matter; implicitly drawing in the attention of the Chairperson of Council at Cott and the Chairperson of ABoTE for possible consideration to deliberate the matter at higher Provincial forums in ACSA such as the Synod of Bishops. Bishop Peter Lee, in one of his correspondences with Pityana, remained concerned:

I must say that theological education has been an area of on-going failure during my time in the Synod of Bishops, and it has been very sad. We don't just seem to have been able to get it right. Having sat for 6 years on the Council of Cott at its inception, I have found some of Cott's troubles and digressions deeply distressing. We really have to get it right, while knowing that Cott also cannot meet all the needs we will have for training as a Church. (E-mail message by Bishop Peter Lee to Revd Canon Prof. Barney Pityana dated 14 September 2012).

In an attempted response to the prevailing circumstances on the subject, Cott, spearheaded by Pityana, facilitated a consultative workshop in 2012 whose focus was to explore possible strategies which could be used to enhance collaboration between different organisations (activity systems) involved in clergy leadership formation programmes and processes in ACSA. Three issues formed the agenda of the consultation:

- i) Identification and discussion of qualities, skills and abilities deemed critically important for ACSA ordinands at the time of ordination.
- ii) Deliberation of the responsibility for nurturing and developing such qualities, skills and abilities between Cott and ACSA dioceses.
- iii) Deliberation of ideas relating to post-ordination training. (ACSA clergy leadership formation resource document, 2012).

In relation to the key areas defining clergy leadership formation in ACSA as discussed in Section 1.2.2.1, the table below captures the critical issues which emerged at the consultative workshop:

**Table 1.1: Skills and abilities deemed requisite for ACSA ordinands at the time of ordination**

<b>COGNITIVE - ACADEMIC</b> (Knowing)	<b>SPIRITUALITY/CHARACTER</b> (Being)	<b>MINISTERIAL PRACTICE</b> (Doing)
<p>ACSA leaders should be equipped theologically.</p> <p>A diploma in theology should be the basic qualification for anyone to be considered for ordination.</p>	A faith-based character.	Able to write reports; facilitation skills.
	Loving and caring.	Inter- and intra-personal skills.
	Has a high Emotional Quotient (EQ).	Able to teach and preach intelligently.
	Person whose life is based on prayer and worship.	Competent leader.
	Dedicated.	Able administrator.
		Knows what it means to be an Anglican.
		Able to build community; Able to manage diversity.

Delegates at the consultation had agreed that Cott and dioceses needed to collaborate in the responsibility of ensuring that the identified and agreed requirements and expectations were enforced and reinforced in the facilitation of clergy leadership formation at all levels in ACSA. Delegates had also been asked to allocate time for reflections on these outcomes with leadership personnel in their dioceses before application of the ideas in their local clergy leadership formation practices.

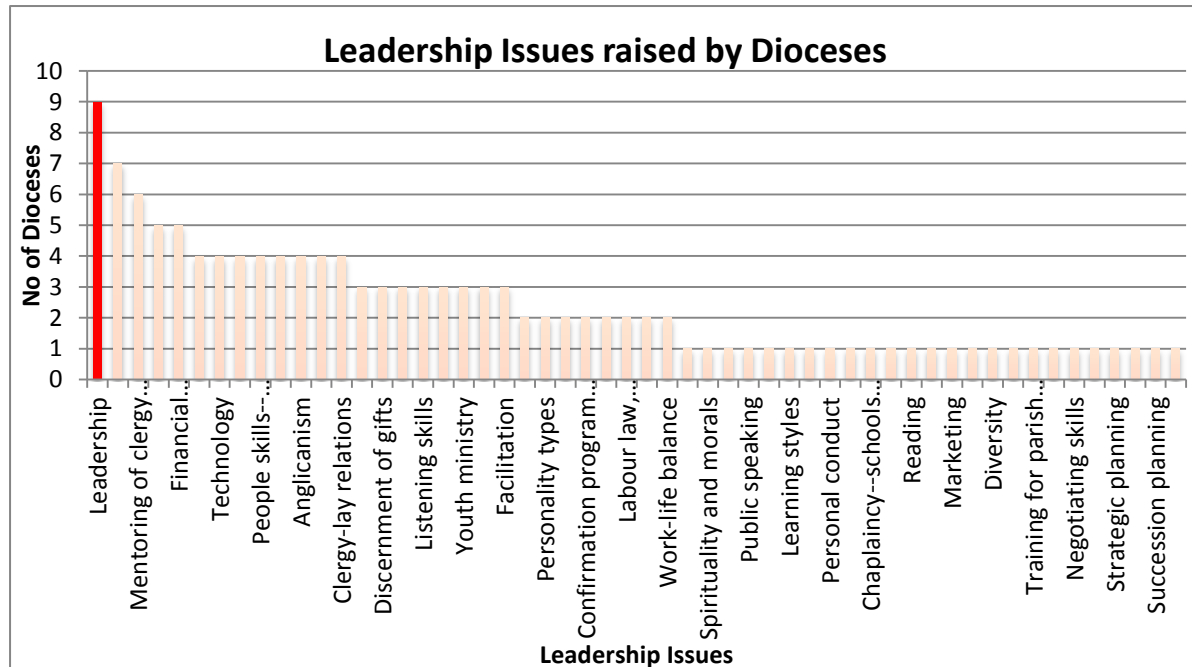
In addition to the sources of information discussed above, Linthicum and Chinganga (2013) report of research on the subject (clergy leadership formation) which was conducted in twelve dioceses constituting ACSA, based on two questions below:

- 1) What sort of leadership formation is currently taking place in your diocese?
- 2) What topics are essential for inclusion in the new Provincial (ACSA) leadership formation programme?<sup>9</sup>

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<sup>9</sup>It had been envisioned that the research process would culminate in an informed ACSA leadership development/formation programme for ordination and non-ordination purposes.

An analysis of the data which emerged from the research process indicated that the issues in Figure 1.2 were considered critical for the envisioned leadership formation programme.



**Figure 1.2: Identified critical issues for new Leadership Development Programme (LDP) in ACSA**

Linthicum and Chinganga (2013) explained that participant responses to the two questions posed suggested two things:

- i) hunger for leadership formation, evidenced in the activities of a variety of ACSA structures (activity systems) in the different dioceses visited;
- ii) facilitation of leadership formation was understood and practised differently in the dioceses which constitute ACSA, which implied diverse conceptualisations of clergy leadership in both theory and practice. As a result, respondents in 9 of the 12 dioceses visited had requested an in-depth and contextualised conceptualisation of the term *leadership* (see Figure 1.2). It had been argued that doing so would equip participants in ACSA clergy leadership formation practices with relevant theoretical and practical tools on the subject. Additionally, it was thought that ACSA would enhance her capability to monitor and bring to accountability all activity systems involved in clergy leadership formation programmes and activities. Such measures would ensure that no diocese or activity system in ACSA would “stand alone” in the practice of clergy leadership formation.

In 2013, Cott facilitated a Colloquium on theological education whose objective was, in the first instance, to deliberate and reflect on the value of theological education to the church and, in the second instance, to explore how the outcomes of the colloquium would guide ACSA towards a:

... renewed commitment to understand ministerial formation to be a seamless robe from parish to diocese to College (Cott) ... (and) the need to design uniform standards of competency for all those who are to be ordained to the ministry of the church (Pityana, in *From Root to Branch*, 2013, p. 3).

The colloquium was attended by participants from different parts of the province (ACSA), scholars and theologians from South Africa and the Church of England. The theme/title of the colloquium, *From Root to Branch*, served to emphasise a required collaborative working strategy between the different activity systems involved in clergy leadership formation programmes and processes in ACSA. Included in the deliberations was a review and analysis of findings of the research processes on theological education, training and ministerial formation which had previously been done in the province in the period 2003 to 2012. In view of the focus of this study, I summarise below the proposals which, subsequent to the deliberations, the colloquium made for ACSA to consider in her on-going clergy leadership formation programmes and processes:

**Table 1.2: Overview of integration of study across chapters**

<b>FOCUS OF PROPOSAL</b>	<b>PROPOSAL SPECIFICATIONS</b>
<b>Provincial guidelines and standards</b>	ABoTE was requested to draft guidelines on clergy leadership formation programmes, processes and activities in ACSA on the basis of three key result areas, namely: knowledge; character and skills. The guidelines should include a discernible discernment process with key points at which candidates would be examined on the basis of the three key result areas. Overall, all clergy leadership formation programmes would need to be facilitated within the framework of Anglicanism.
<b>Structure and Agency</b>	ABoTE, Cott and TfM were requested to draft guidelines on the roles for all the activity systems and individuals involved in clergy leadership formation in ACSA. Structures would include parishes, dioceses, Cott, ministry review instruments and others. Formators would include bishops with the assistance of carefully selected parish priests (parish rectors), diocesan educators (Deans of

	Studies), and others. ABoTE, in consultation with bishops in ACSA, would design a training programme intended to equip the formators. Bishops would be expected to take initiatives of their own further development in theological education and spiritual formation. The objective of these processes was to ensure that there was integration of understandings about clergy leadership formation practices in ACSA and existence of a high level of accountability on all activity systems and individuals involved.
Partnerships beyond ACSA	Leaders of activity systems involved in clergy leadership formation in ACSA were requested to participate in initiatives to create an umbrella ecumenical body for theological education institutions in southern Africa.

The sources of information discussed above, to the best of my knowledge, constitute the literature available on clergy leadership formation practices in ACSA. A synthesis and critical analysis of the information, on one hand, suggests an incompatibility between formalised operational structures and practices in the conceptualisation and facilitation of clergy leadership formation programmes in ACSA. This seemingly deep-seated incongruity comes through the concerns raised by individual formators such as Pityana, Pato and Ndungane as presented earlier in this section.

Further, the goals and objectives set for the consultations, workshops, research projects and colloquium deliberations discussed above evidence a quest to normalise something that was not going well in clergy leadership formation programmes and processes in ACSA. On the other hand, even though the information suggests multiple formator understandings of the subject and dissonances between organisational structural arrangements and practices in clergy leadership formation practices in ACSA, there was potential for expansion through learning towards transformation in both theory and practice.

In response to the above context, this study has an interest in investigating the kind of learning that happens within and between the different activity systems involved in clergy leadership formation programmes and processes. It is envisioned that the findings thereof would give clues of the basis<sup>10</sup> on which participants and activity systems involved in clergy

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<sup>10</sup> The critical realist understanding of a “structured, differentiated, stratified and changing” world (Ackroyd & Fleetwood, 2000, p. 5) is used in the study to unearth “underlying mechanisms” (Bhaskar, 1993) which trigger

leadership practices in ACSA conceptualise, plan, facilitate and manage their programmes and activities. Further, the study endeavours to explore collaborative practices in clergy leadership formation practices in ACSA that can be expanded through learning.

To the best of my knowledge, this study is ground-breaking research in ACSA.

#### **1.4 RESEARCH GOALS**

- i) Investigate learning processes that will enable critical engagement with the current practices in the facilitation of clergy leadership formation in ACSA.
- ii) Surface and critically interrogate underlying causal mechanisms that have shaped and continue to influence facilitation practices in clergy leadership formation in ACSA.
- iii) Develop mediation tools that support expansive learning of collaborative facilitation of clergy leadership formation in ACSA.

#### **1.5 RESEARCH QUESTIONS**

In order for the research to achieve the above goals, the following questions will be raised and investigated throughout the research process:

##### **1.5.1 Main questions**

- What learning in facilitation of leadership formation takes place among different participant groups in ACSA?
- What are the leadership formation collaborative practices that can be expanded through learning in this context?
- How can such learning be expanded amongst key participants?
- What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?

##### **1.5.2 Sub questions**

- What types of learning interactions occur amongst the key facilitators of leadership formation in ACSA?

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and influence phenomena to be experienced in particular ways in given contexts, ACSA in the case of this study (refer to Chapter 2 for a detailed discussion of the critical realist ontological and epistemological orientation). As articulated in the goals and questions designed for the study (sections 1.4 and 1.5), these “underlying mechanisms” could be of a historical, social or cultural nature.

- What do facilitators learn when they come together?
- How can the learning interactions on collaborative facilitation be expanded?
- What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive learning process interactions?

## **1.6 RESEARCH DESIGN**

### **1.6.1 Theoretical framework**

I used critical realism as a theoretical framework in the study. Critical realists view the world as “structured, differentiated, stratified and changing” (Ackroyd & Fleetwood, 2000, p. 5) and distinguish reality in three different domains of real, actual and empirical. The real is understood as the sphere of objects or entities and the underlying mechanisms that constitute and produce them (i.e. structures, causal powers, relations). The actual is understood to refer to events or actions (whether or not they are observable); what (actually) happens if and when the structures of those social entities are activated; what they do and what eventuates when they do (their effects). The empirical is understood as our experiences and perceptions of the phenomena.

Structure and agency are key words within the critical realist paradigm which, in constant interplay, distinguishes “things” which are out there, or which can be created with emergent causal powers and those who act (human beings), which is also a manifestation of causal powers. The study has an interest in investigating what happens when structures are activated in relation to the facilitation of clergy leadership formation in ACSA, particularly the goal to transform current practices through expansive learning (Engeström, 1999a) (see 2.2).

The study also employs educational leadership theory as an analytical tool in the task of deciphering meaning out of emerging models of clergy leadership formation practices in ACSA. What is strongly emphasised in the theory is the inclination towards transforming leadership models on the basis of “freedom (that) enables actors to participate effectively in shaping the boundaries that define for them the field of what is possible” (Hayward, 1998, p. 12).

### **1.6.2 Methodology and methods**

In consideration of the goal and theoretical frameworks used in the study as explained in previous sections of the chapter, the study had an emancipatory interest to enhance the

agency of formators in clergy leadership formation practices in ACSA. As such, it was necessary to employ methodological tools and data collection methods which would provide opportunities for ACSA formators to learn collectively on how they could transform their practices at two levels: personal (agency) and organisational (cultural practices) (refer to 6.2).

I used the Cultural Historical Activity Theory (CHAT) framework as the basis of the methodology for the study (refer to 2.3). In particular, I drew on two methodological tools embedded within the CHAT framework namely the Expansive Learning Cycle (ELC) and Developmental Work Research (DWR) (refer to 2.3 and 3.2.1 respectively).

### **1.6.3 Conceptual framework**

On the basis of Vygotsky's theory of human consciousness development, I created a conceptual framework for the study drawing from the theoretical and methodological research tools used in the study, which I explained in Section 1.6.1 and 1.6.2 above (refer to Chapter Two, Three, Seven and Nine; see Tables 2.1 and 9.1). As such, where *conceptual framework* is used in the study, particularly in Chapter Two, Seven, Eight and Nine, it is with reference to the integration of the theoretical and methodological tools used in the study.

## **1.7 OUTLINE OF THESIS**

Chapter One is a presentation of the purpose, goals, research questions, as well as theoretical, methodological and conceptual frameworks of the study. The object of the study and subject of the object of the study are highlighted in the chapter. The chapter also discusses the context within which the study was conducted. It concludes with brief summaries of what each chapter contributes to the whole study.

Chapter Two discusses the theoretical frameworks which provide the study with ontological and epistemological perspectives which helped me to decipher meaning from the phenomena which constitute the study.

Chapter Three is a presentation of how I engaged with research participants to generate and gather data for the study. The chapter also discusses how I handled and analysed the data in line with the research questions and the theoretical framework discussed in Chapter Two. The chapter, therefore, addresses research methodologies and methods employed in the study.

Chapter Four investigates the historical foundations of Christian leadership formation processes with the objective of establishing clergy leadership formation models relevant to ACSA from inception (1848) to date (2017). The chapter discusses how the developments which have happened in the church from its inception have contributed to the emergence of distinct Christian leadership formation models which form the basis of clergy leadership formation in ACSA.

Chapter Five surfaces contradictions in and between the activity systems which constituted the two case studies which were used in the study through an analysis of the data which had been gathered from each of the activity systems involved.

Chapter Six, on the basis of the contradictions which had been revealed within the two case studies used in the study, presents CLWs which were facilitated for each of the two case studies.

Chapter Seven discusses the effectiveness of the selected theoretical and methodological frameworks in the study for purposes of knowledge consolidation and expansion in the area of research.

Chapter Eight, on the basis of the conceptual framework of the study, critically engages the emerging models of clergy leadership formation in ACSA, drawing information for engagement and illustration from Chapters Two, Five, Six, and Seven.

In Chapter Nine I present research findings in summary, do concluding reflections and give recommendations on the basis of the findings in response to the research questions set for the study. I then conclude the study.

### 1.7.1 Overview of integration of study across chapters

CHAPTER	CONTENT	CHAPTER INTEGRATION
1	<b>INTRODUCTION TO THE STUDY</b>	
2	<b>THEORETICAL FRAMEWORK</b>	Guided in data collection, organisation of CLWs and data analysis processes in Chapters Five and Six.  Created <u>conceptual framework</u> for analysis of emergent issues from CLWs (Chapter Seven and Eight).
3	<b>METHODOLOGY AND METHODS</b>	
4	<b>HISTORICAL BASIS OF ACSA CLERGY LEADERSHIP FORMATION MODELS:</b>  Models of Christian identity formation as the basis of church/Christian leadership formation whose genesis is in the New Testament of the Bible.  Models of church/Christian leadership formation beyond the New Testament times up to the Reformation period (16 <sup>th</sup> century).  Models of church/Christian leadership formation in the Anglican Church as a Communion (global denomination).  Emerging models of clergy leadership formation in CPSA which changed name to ACSA in 2007.	Provided Chapter Five and Six with <i>Mirror data</i> .  Provided a historical basis for an analytical discussion of emerging clergy leadership formation models in ACSA in Chapter Eight and suggestion of recommendations in Chapter Nine.
5	<b>SURFACING CONTRADICTIONS ACROSS CASE STUDIES.</b>	Provided Chapter Six with information pertaining contradictions revealed in clergy leadership formation programmes and activities in ACSA.
6	<b>EXPANSIVE LEARNING ACROSS CASE STUDIES.</b>	Provided Chapters Seven, Eight and Nine with critical issues emerging from CLWs on clergy leadership formation programmes and activities in ACSA for analysis and suggestion of recommendations for the future.
		Deciphered the effectiveness of the theoretical and methodological

7	<b>ANALYSES OF THEORETICAL AND METHODOLOGICAL FRAMEWORKS.</b>	frameworks which were used in guiding data collection, organisation of CLWs and data analysis processes in the study.  On the basis of the Vygotskian philosophical analytical lens, the theoretical and methodological frameworks used in the study were critically discussed to create a conceptual framework for the study.
8	<b>REFLECTIONS ON EMERGING MODELS OF CLERGY LEADERSHIP FORMATION IN ACSA.</b>	The conceptual framework of the study was used to critically discuss the emerging models of clergy leadership formation in ACSA basing on Chapters Two, Five, Six and Seven.
9	<b>RECOMMENDATIONS AND CONCLUSION</b>	

## **1.8 CONCLUSION**

In this chapter, I presented the background information to the study which included discussions on my personal history and motivation to do the study; research context; problem statement of the study; goals and questions; research design and brief summaries of each of the chapters of the study.

The next chapter discusses the theoretical framework of the study.

## CHAPTER TWO: THEORETICAL FRAMEWORK

*Thinking through, critically and carefully, what most people take for granted is, I believe, the chief task of philosophy, and it is this task that makes philosophy a worthwhile activity.* (Peter Singer)

*By reflecting critically on our taken-for-granted worlds, and the way in which our lives are affected by these constructions, we may be freed to consider alternatives.* (Kenneth J. Gergen)

### 2.1 INTRODUCTION

The purpose of this chapter is to discuss the ontological and epistemological positions<sup>11</sup> which I drew on in the study. Essentially, these frameworks provide researchers in the field of social science with theoretical frames to interrogate understandings of the nature of the world and consider how those understandings, in the case of this study, influence the manner in which clergy leadership formation programmes and activities are conceptualised, planned, facilitated and managed. The theories discussed in the chapter were selected on the basis of their inherent interest in transformative learning which has the potential to assist with enhancing the agency and capabilities of the research participants whose role is to facilitate clergy leadership formation programmes and activities in ACSA.

In order to do an in-depth investigation of the learning that happens in the facilitation of clergy leadership formation in ACSA, I drew on the epistemological framework of Cultural Historical Activity Theory (CHAT) to enable me to view the study as an activity system (3<sup>rd</sup> generation). Critical realism, an ontological theory, provided a framework for the investigation and critique of the causal mechanisms that must have shaped and continue to

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<sup>11</sup>Boeree (1999) postulates that there are two approaches to deliberating the concept epistemology in relation to ontology: rationalism and empiricism. Rationalism asserts that we can gain knowledge about reality or the nature of the world through reasoning which incorporates “a priori truth” (self-evident truth) and “deduction” (the process of implying or inferring something). To illustrate rationalism, it could be said that *something is true because it was made that way*; and “deduction”, it could be assumed that *if one plus one is two, then by a process of deduction two minus one is one*. Empiricism focuses on “empirical truth” which is *truth* derived from experience. Observation is a key method in empiricism. Two examples of types of empiricism are “realism” and “idealism”, each with its own forms. Two forms of realism are “direct realism” or “naïve realism” which suggests that “what you see is what you get”; and “critical realism” which suggests that we see sensations, the images of things in the world, not the things directly” (Boeree, 1999, p. 4). John Locke is regarded as the founder of this school of thought ([www.iep.utm.edu/locke/](http://www.iep.utm.edu/locke/)). Section 3.2 discusses “critical realism” in a more detailed way as the philosophical framework used in the study is premised on the concept. Concerning idealism, empiricists argue that nothing exists until it has been perceived, “the ideas and thoughts of a mind or minds constitute the essence or fundamental nature of all reality” ([philosophyschoolsystems/p/idealism.htm](http://philosophyschoolsystems/p/idealism.htm)). These philosophical perspectives foreground the theoretical framework used in this study.

influence the facilitation of clergy leadership formation in ACSA. The engagement is aimed at exploring possible learning opportunities that have the potential to expand the current clergy leadership formation models in ACSA towards collaborative and transforming practices. In section 2.7 I explain how CHAT, critical realism and a critical realist understanding of leadership complement in the study.

I discuss critical realism next, followed by CHAT in Section 2.3.

## **2.2 CRITICAL REALISM AS PHILOSOPHICAL UNDERLABOURER**

### **2.2.1 An overview of critical realism**

The background to critical realism is located in the postulations of earlier philosophers such as Locke (17<sup>th</sup> century) and Kant (19<sup>th</sup> century). Locke (1894) argues that philosophy can be regarded as the “underlabourer” to both research and practice (Bhaskar, 1979; 2000), meaning that philosophy can assist researchers with “clearing the ground a little ... removing some of the rubbish that lies in the way of knowledge” (Locke, 1894, p. 14). Concurring with this point of view, Walsham (1995) argues that philosophical reflection is required for a consistent, rational and logical research process. Ingrained in these assertions is the acknowledgement of the fallibility of knowledge claims about reality (Bhaskar, 1998; Archer, 2003) which is a central characteristic of critical realism as will be elaborated in Section 3.2.2.

The principal proponents of critical realism are Bhaskar (1989), Sayer, (2000), Benton and Craib (2001) and Archer (2003). Bhaskar is attributed with birthing the concept in response to what he understood as fundamental flaws in the nature of scientific enquiry. Contrary to perceptions about knowledge by earlier philosophical theorists who included empiricists and positivists<sup>12</sup>, Bhaskar points to two significant ontological shortcomings inherent in the

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<sup>12</sup>“Positivism is the view that the only authentic knowledge is scientific knowledge, and that such knowledge can only come from positive affirmation of theories through strict scientific methods (techniques for investigating phenomena based on gathering observable, empirical and measurable evidence, subject to specific principles of reasoning). The doctrine was developed in the mid-19th Century by the French sociologist and philosopher Auguste Comte (1798-1857). The term ‘positive’ in the epistemological sense indicates a “value-free” or objective approach to the study of humanity that shares much in common with methods employed in the natural sciences, as contrasted with “normative”, which is indicative of how things should or ought to be” ([http://www.philosophybasics.com/branch\\_positivism.html](http://www.philosophybasics.com/branch_positivism.html)).

earlier scientific traditions, namely: the limitations of anthropocentric philosophy and the epistemic fallacy<sup>13</sup> (Bhaskar, 1998; Archer, 2003).

Bhaskar's philosophical contention is that humanity's understanding of reality is always limited in both cognitive processing and verbal articulation. As such, Bhaskar avers that most philosophical accounts of reality "always bear the mark or insignia of some human attribute", either in terms of what is experienced or what is expressed verbally (1989, p. 147). Further, Bhaskar argues that these scientific shortfalls amount to the conflation of epistemology and ontology, meaning attributing that which can be known or perceived through the senses as the "real" (*ibid.*).<sup>14</sup>

In view of the above, the philosophical assumptions and goals of the critical realist approach, which is grounded in the conviction that "there is a world independent of our knowledge ... whether we experience or observe it or not" (Danermark, Ekström, Jakobsen, & Karlsson, 2002, p. 124), could be considered ingrained and articulated in the following questions:

- i) What is the nature of the world?
- ii) How are events unfolding in the world?
- iii) What can be touched, felt, imagined or assumed?
- iv) Who is doing what and how?
- v) What could be the reason(s) for the way things are?

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<sup>13</sup>Epistemic fallacy: "According to Bhaskar, the 'epistemic fallacy' is answering a question about 'ontology' (by which he means whether some particular thing *exists*) with an answer about our *knowledge* of it, i.e., 'epistemology', as if whether something exists were the same question as whether we know it exists" (<http://home.mira.net/~andy/works/bhaskar.htm>). Essentially, 'epistemic fallacy' reinforces the critical realist assertion that human capacity to know the world is limited or fallible. Agents, because they are social beings, engage in social projects in ways that are informed and shaped by their social locations. Essential to social engagements is the expression of individual understandings of phenomena or events happening in the world (ontological subjectivity) which do not necessarily represent the truth (ontological objectivity) (Archer, 2003, p. 15). What agents see or experience is not necessarily the whole truth (Parker, 2001).

<sup>14</sup>Critical realists observe that *reality exists in the world independent of what we think*. Central to this belief is the notion that *knowledge systems are contextual*: what is deemed knowledge elsewhere may not necessarily apply in similar ways in a different context or in a different event. What this says is that knowledge is used in different ways for different purposes in different contexts. As such, *how knowledge is perceived and handled is a critical issue in critical realism*. For instance, when an event happens, what do people see? In the first instance, it is of paramount importance to establish who these people are. Thereafter we would investigate the meaning(s) they attach to what they experience, at a personal level, remotely, or collectively. This is a quest that takes into consideration a number of factors including where the event happened, the people involved (subjects), the probable causes of the event, the reason(s) why the event might have happened and who we are (those acting in the capacity of enquirers or investigators; researchers). Critical realists give value to such considerations on the understanding that our prior experiences have a bearing on how we respond to events which happen around us and also the acknowledgement that what we understand as truth about a particular thing is neither normative nor infallible. Critical realism is therefore ontologically bold but epistemologically cautious. The collection and analysis of data in this study is guided by these theoretical emphases.

In the next section, I discuss the characteristics of critical realism.

## **2.2.2 Characteristics of critical realism**

### ***2.2.2.1 Critical realist ontology: Stratified reality***

Critical realists view the world as “structured, differentiated, stratified and changing” (Ackroyd & Fleetwood, 2000, p. 5) and view reality as comprising of three different domains of real, actual and empirical. The real is understood as the sphere of objects (material) or entities and the underlying mechanisms (immaterial) that constitute and produce them such as structures, people (agents), relations, connections and others (Sayer, 2011). In critical realist parlance, these phenomena possess causal properties which, when triggered, result in actions which are experienced in the next stratum, the domain of the actual. Critical realists maintain that these actions or events may or may not be observable but are consequential or effectual when their social and cultural structures have been activated. The empirical is understood as our experiences and perceptions of the phenomena (Sayer, 2000; Danermark et al., 2002; Archer, 2003).

The critical realist approach, therefore, emphasises that events and actions in the world (experienced or not experienced) do not just happen; there is always a driving force behind phenomena, which is located in the “basal”, the domain of the “real” (Bhaskar, 1997a; Fairclough, 2001). What people experience should therefore be understood as part of the totality of what happens “out there” (Archer, 2003). As such, critical realism aims to “penetrate behind the surface of experiences and perceptions and ... account for what occurs in terms of an understanding of connections at the levels of structures” (Ackroyd & Fleetwood, 2000, p. 13). It is on this premise that this study will not predict or claim as “*the truth*” the observations and experiences of the research participants concerning clergy leadership formation practices in ACSA.

An illustration to try to make practical sense of a “stratified ontology” could be derived from the field of medicine. A person infected by a virus which causes chicken pox would not suffer from the disease straight away. It may take a couple of weeks or more before the chicken pox begins to show on the person’s skin or body. In critical realist thinking, what eventually shows on the person’s body tells a long story which includes details about when the person could have contracted the virus, the person’s general health status, whether the

person had been immunised against chicken pox infection, and whether the person at some point in the past had suffered from chicken pox or not.

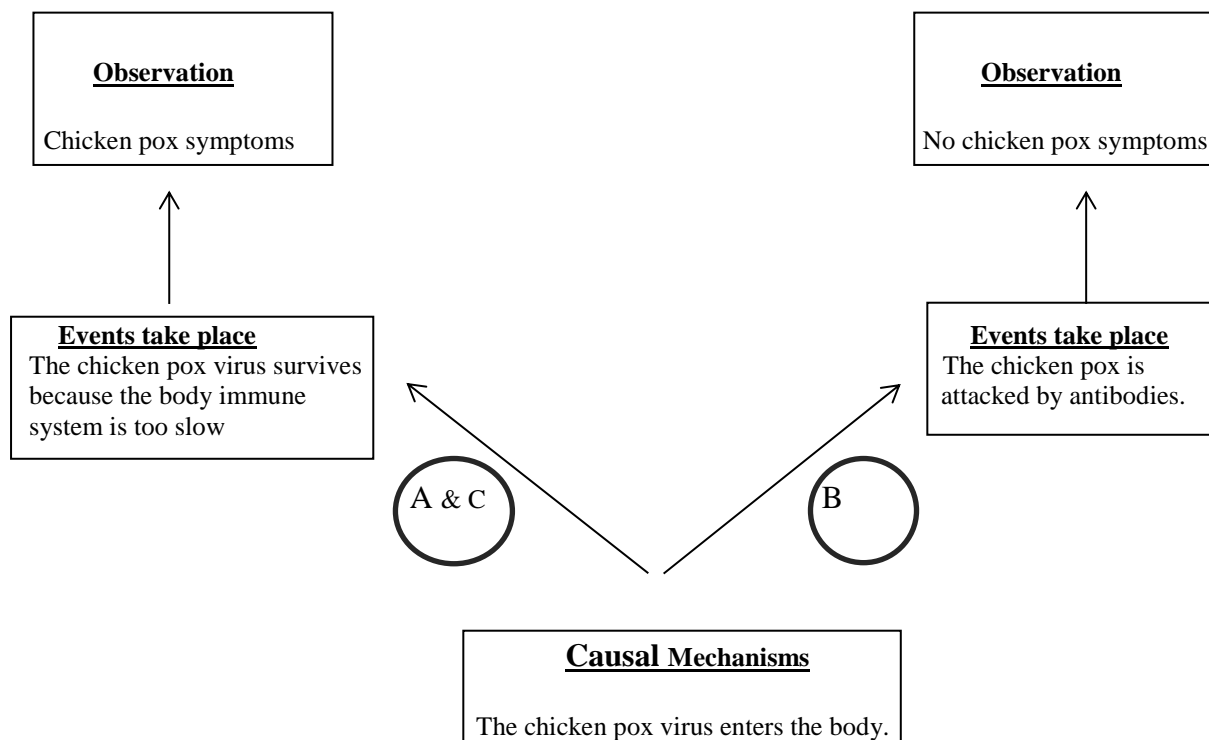
In the event that the person would have suffered from the disease in the past, the person's body would probably be prepared to resist new infection due to a developed immune system against that particular disease. A first-time infection would almost certainly overpower the body's immune system, resulting in the infection showing on the person's body.

An unfortunate scenario would be a case where the victim already has a weak immune system due to ill health. In such a situation, the person's body would most likely be unable to fight the new infection, and so it would manifest on the person's body.

Different pathways emerge on the basis of the different scenarios explained above. Pathway *A* would be a case of first encounter with the virus, which results in its manifestation on the person's body. Pathway *B* would be a second encounter with the virus, resulting in the infection probably not showing on the person's body. Pathway *C* would be an encounter with the virus with a body already incapacitated in terms of immunity. In that case the infection would most likely manifest on the person's body, maybe with multiple complications.

Specialised expertise would be needed to explain the cause(s) of the chicken pox virus. "What you see is what you get" is a popular colloquial statement, but critical realists would say "what you see may not necessary be the real". Whatever the scenario might be, it would be necessary to investigate the cause of the phenomenon observable on the victim's body, in this case, chicken pox.

The diagram below demonstrates the chicken pox illustration from the perspective of the three domains of "stratified ontology":



**Figure 2.1:** An illustration of “stratified ontology” showing how mechanisms produce events which can be observed or not<sup>15</sup> (Adapted from an unreferenced resource document)

A critical realist analysis of the diagram above:

**Domain of the real:** The chicken pox virus is representative of the underlying generative or causal mechanisms which are located at the level of structures as already explained at the beginning of this section.

**Domain of the actual:** In relation to the dual Pathway *A and C*, the chicken pox virus is “activated” because of the health conditions of the victim which include being a first time victim of the virus and incapacitated immune system, in addition to other “internal relations and connections” in the infection process (Archer, 2003, p. 15) which we may not be aware of such as dietary constraints, age and living conditions the person is subjected to. Pathway *B* brings to the fore the critical realist assertion that the relationship between mechanisms and

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<sup>15</sup>This illustration was inspired by a personal experience which I had in 2014 involving one of our ordinands (27 year old lady) who, from nowhere, suddenly developed blister like pimples on one side of her face. A doctor’s diagnosis confirmed that the pimples were a manifestation of a disease against which she had not been immunised at an early stage of her life. This was a light bulb moment for me as, at that time, I was still struggling to understand the philosophical essence of the critical realist approach and working out how it could assist me in constructing a relevant and enabling theoretical framework for my study.

events or objects is not necessarily one of “cause and effect” (Sayer, 2000). It is possible that a mechanism exists without a resultant outcome or effect, or with a different and unexpected outcome/effect. Critical realists call this “tendency” (Danermark et al., 2002, p. 55). The fact that the chicken pox virus did not manifest on the person’s body would not amount to its non-existence but rather point to the constraining causal properties characteristic of the “context” of the potential viral infection, in this case the prospective victim’s capacitated immune system (Danermark et al., 2002, p. 55). The implications of this critical realist caution on my study is *how* I handle, manage and analyse the data gathered in the process of investigating the causal mechanisms which may have caused and continue to shape the clergy leadership formation practices in ACSA.

#### ***2.2.2.2 Structure and agency***

The concepts “structure” and “agency” are at the core of a critical realist ontology and epistemology. In critical realist literature, an effort is made to define the two concepts by way of contrasting them. However, such an effort has been acknowledged as tenuous because of the observation that the two concepts embody “complex mutuality” as detailed below (Bhaskar, 1998; Archer, 2003).

Structure, also referred to as social systems, includes such factors as social class, religion, gender, customs, policies, and others (located in the domain of the ‘real’) which influence people and the opportunities which may be at their disposal for personal or collective transformation in context, as detailed in Section 3.2.2.2.1 (also see Figure 7.1). Mezirow (1990, p. 45), an adult education theorist, calls these “frames of reference” while Geertz (1973, p. 331) calls them “political instruments”. In critical realist parlance, social structures are attributed as “emergent causal powers” which either enable or constrain the activities of agents (agential projects) (Bhaskar, 1998; Archer, 2003). An on-going conversation in critical realist circles focuses on the opinion that social and cultural structures, which are believed to be enduring and stable, are created or reproduced and/or transformed by human beings to serve their desired purposes (ontological objectivity) (Bhaskar, 1998; Archer, 2003).

Agency, on the other hand, refers to people who create, recreate, and transform social structures which in turn influence their (people’s) activities (agential projects). What that says about agency is that people are endowed with the capacity to deliberate, plan, select, revise, and make choices in line with what they care for most or are more concerned about in their

lives (ontological subjectivity) (Archer, 2003; Sayer, 2011). Hays (1999, p. 64) asserts that the choices that agents make do not necessarily happen consciously but also unconsciously. Further, he cautions that agential choices should not be understood as happening in isolation. Rather, they are “socially shaped” (*ibid.*) and influenced by the constituents of the “basal” (the real domain) such as structures (Danermark et al., 2002, p. 67; refer to 7.2.1.1). Agency will be further explored in Section 3.2.2.2.1.

The extent to which critical realist literature argues for the observance of interplay between structure and agency suggests that, on a practical level, it is not possible to have one without the other. Jackson (1999, p. 550) explains further this critical realist ontological and epistemological positioning arguing that “structures can be reproduced and transformed *only* through agency, and agents can come into existence *only* within a structured environment”. On the basis of this philosophical perspective, Archer (1996) advances what she calls “analytical dualism” in which structure and agency can be understood as separate entities because they all have causal powers to influence social reality. She views the conflation of the concepts as the “fallacy of conflation” (*ibid.*).

According to Danermark et al. (2002, p. 179), three theories have emerged concerning the discourse on the relationship between structure and agency:

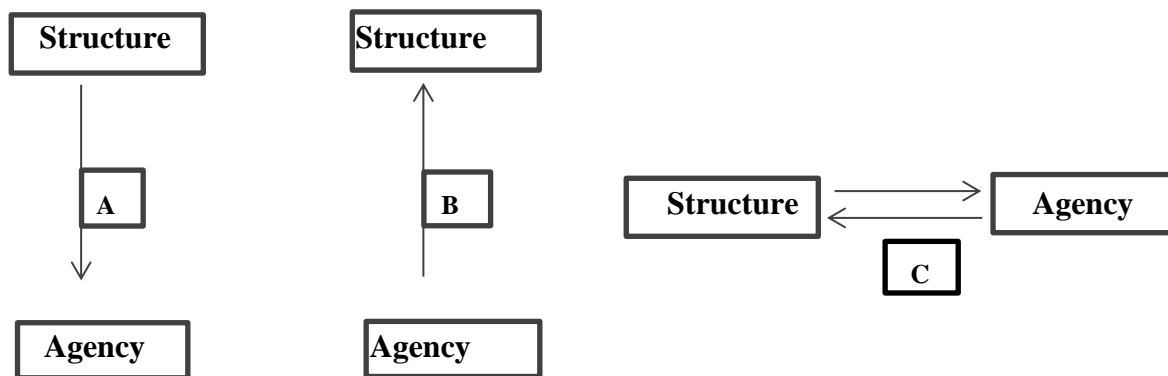
**1<sup>st</sup> theory:** “Social fact theory” which stipulates that everything begins with structures where agency is determined by the individuals’ “positions in different (organisational) structures” (*ibid.*). Further, the theory asserts the assumption that positional roles delegated to organisational or societal members may be determined on the basis of age, gender, race, economic status, social status and others. In critical realist terminology, this theory suggests a “downward conflation”, meaning that agents are not autonomous but dependent on structures (as illustrated in Figure 2.2 below) (*ibid.*).

**2<sup>nd</sup> theory:** “Agency paradigm theory” which is the opposite of the first theory in the sense that it emphasises that the behaviour of the agent initiates organisational or societal action towards achieving desired organisational or societal common goals. As such, the theory’s focus is on “agential subjective causation” rather than “objective causation” (Archer, 2003, p. 23). In contrast, sociologists like Weber (1947, p. 4) are of the understanding that “action is social in so far as its subjective meaning takes account of the behaviour of others”, implying that social action involves other people and is determined and affected by social norms (see

Figure 7.1). Opposed to the 1<sup>st</sup> theory, this theory suggests an “upward conflation” where structures are dependent on what the agents do (illustrated in Figure 2.2) (Danermark et al., 2002, p. 179).

**3<sup>rd</sup> theory:** This theory is a spin-off from the arguments about conflation which preoccupy the first two theories as discussed above. The theory is based on Giddens’ (1984) “structuration theory” which states that structure and agency are in fact dependent on each other, thus they “can only exist by virtue of each other” (Danermark et al., 2002, p. 179), what Archer (2003) calls “analytical dualism”.

The diagram below demonstrates the argument advanced in the three theories above:



**Figure 2.2: A schematic diagram illustrating conflation**

In Figure 2.2, A represents downward conflation; B upward conflation; and C where structure and agency are dependent on each other, thereby avoiding conflation and emphasising “analytical dualism”.

#### 2.2.2.2.1 Critical realist response to conflation, structuration theories

What agents do within the frames of given social structures in critical realist ontology is known as mediation (Bhaskar, 1993; Archer, 2003; see 7.2.1.1). The understanding is that agents are always at work endeavouring to improve their lives and their communities which demands reproducing or transforming existing structures (Danermark et al., 2002, p. 180). This confirms the critical realist commitment to transformational and transformative processes. In the context of an organisation such as ACSA, this would entail revision or

adjustment of structural tools such as policies, rules and regulations in line with organisational developments and needs such as those that pertain to clergy leadership formation practices as introduced in Chapter One and Two and discussed and analysed in Chapter Five, Six, Seven and Eight.

Further, critical realists argue that mediation of transformational and transformative work requires individuals who have an ability to deliberate reflexively on life as lived in their context. In her book entitled *Structure, Agency and the Internal Conversation* (2003, p. 9), Archer interrogates the social realist argument that “the causal power of social forms is mediated through social agency”. Underlined in this statement is Archer’s opinion that the preoccupation of realist social theorising had been based on the argument that social structures influence agency more than is the case the other way around (social fact theory), hence the existence of behaviourist theories which emphasise conditioning.

In contrast, Archer (2003, p. 9) advances an argument that observes agential powers, what she calls “emergent personal powers”. She bases her argument on the understanding that agents (people) are imbued with abilities to deliberate or reflect on their experiences (subjective reflexivity) whereas structural forms, even though they are understood to be already in existence and relatively enduring and stable (structural objectivity), can be changed (with structural limitations in some cases) to meet the needs and aspirations of a given community over time; thus, countering notions of reification of social forms (*ibid.*).

In this discourse, subjective reflexivity implies a biased agential perspective on reality (subjective ontology). It is this quality that Archer attributes to individual agents: “a kind of mental activity which of its nature has to originate in the private domain: that is one where it is a matter of pure contingency whether it is given in public articulation or any determinate behavioural manifestation” (Archer, 2003, p. 25). This human quality she calls the “internal conversation”. In Archarian understanding, individuals endowed with this quality are “1<sup>st</sup> person” driven people in contrast with those she calls “3<sup>rd</sup> person” driven individuals who, in colloquial language, would be labelled *good for nothings* in a community; people who wait for other people to think on their behalf (see 7.4 & 7.5).

Emerging from the Archarian conceptualisation of the relationship between structure and agency is what Bhaskar (1993, p. 155) calls the “transformational model of human action” whose premise is the understanding that:

People do not create society. For it always pre-exists them and is a necessary condition for their activity. Rather society must be regarded as an ensemble of structures, practices and conventions which individuals reproduce and transform, but which would not exist unless they did so. Society does not exist independently of human activity (the error of reification) but it is not the product of it (the error of voluntarism). (Danermark et al., 2002, p. 180)

The “transformational model of human action” reinforces the critical realist concern with social justice where “agential projects” are initiated with the objective of effecting positive social change in context (Carspecken, 1996, p. 96). It is therefore justifiable to aver that critical realists operate within a transformational/transformational ontology (Danermark et al., 2002; Shields, 2009) where the world is seen as changing and changeable. In arguing for the transformational and transformational model of social action, Bhaskar (as cited in Ackroyd and Fleetwood, 2000, p. 14) postulates that “every action performed requires the pre-existence of some social structures which the agents draw upon in order to initiate action, and in doing so they reproduce and/or transform them”.

It can therefore be argued that transformation ontology revolves around the casual mechanisms, structures, powers and relations that are the ever-present condition of human agency, which is a continuously reproduced and transformed outcome (Ackroyd & Fleetwood, 2000). In order to achieve positive social change, critical realists aim “to raise consciousness of deep-seated causes of oppression as a strategy for tackling oppression” (Houston, 2001, p. 78). As will be detailed under Section 3.3, I drew on CHAT in this study to assist as a methodological tool to raise the participants' consciousness about the underlying structural mechanisms that condition current practices and understandings in the facilitation of clergy leadership formation in ACSA. It was envisaged that such engagement would provide a platform for expansive learning amongst the participants towards enhanced collaboration in their work as formators.<sup>16</sup>

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<sup>16</sup>The study endeavours to “penetrate behind the surface of experiences and perceptions and to account for what occurs in terms of an understanding of connections at the level of structures” (Ackroyd & Fleetwood, 2000, p. 13). In order to account for these connections, the study explores the possible relations (interactions) that exist between the social structures or phenomenon within ACSA (for example relationships between dioceses), in search of empirical evidence to identify the forms of relationships that exist, the generative mechanisms or causal powers that are the source of the relations, and explain what happens when these forces are activated in deliberations and activities connected to ACSA leadership formation programmes.

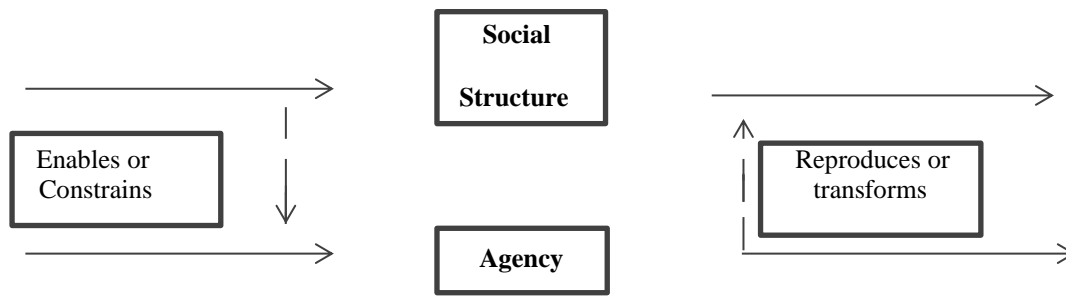
This study's quest to investigate the underlying structural and cultural forms constitutive of ACSA clergy leadership formation practices such as norms, rules, regulations, diocesan correspondences, values, ideas, beliefs and agential powers that could either enable or constrain transformational and transformative practices in clergy leadership formation programmes is located in the critical realist research paradigm. For instance, in view of the clergy leadership formation models which emerge in Chapter Two, diocesan bishops, by virtue of the authority which comes with their responsibilities (agency), have the power at any given time to transform ACSA clergy leadership formation programmes (structure) in line with the espoused provincial goals and values as articulated in the organisational Vision and Mission Statement (Annexure 3.1). The flip side of the discourse is also true: some bishops, for reasons known to themselves and their predecessors, are often reluctant (constraining forces) to adopt new ways of facilitating clergy leadership formation programmes in their jurisdictions even when other dioceses would have embraced the organisational changes in question.

Linked to the above, the study investigates individual participant's understanding of the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA and the current collaborative clergy leadership formation practices that can be expanded through learning (see Chapter Five and Six). I drew on Archer's (2003) conceptualisation of the "internal conversation" and Bhaskar's proposal of the "transformational model of human action" to decipher the extent to which individual "reflexive deliberations" have the potential to reform and transform clergy leadership formation programmes and activities in ACSA towards collaborative and transforming practices.<sup>17</sup>

In view of the thrust of Bhaskar's "transformational model of human action", Giddens' (1984) "structuration theory" could be transformed as below:

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<sup>17</sup>In connection with the "transformational model of human activity", critical realists observe the existence of two different dimensions of the world, the transitive and the intransitive (Bhaskar (1991; 1993). A transitive world is social and historical; one that we can claim to experience and know. On the other hand, an intransitive world is one that exists independent of our knowledge of it (Danermark et al., 2002). The purpose of research such as this study is to endeavour to get closer to an understanding of the intransitive for the reason that it is in this domain that underlying structures and mechanisms that constitute reality are located (*ibid.*).



**Figure 2.3: Illustration of Bhaskar's (1993) "transformational model of human action"**

The model observes structure and agency as separate phenomena, each with its own causal properties. However, each is "essential for how the other will be moulded" (Danermark et al., 2002, p. 18). Social structure can either enable or constrain agency (as shown by the dotted arrow going downwards on the left) while agency can either reproduce or transform structure (as shown by the dotted arrow going upwards on the right). The solid arrows indicate the understanding that structure and agency exist in hierarchical stratification, with the possibility of something emerging as a result of the interplay between the two, hence the emergence theory which I discuss in the next section.

### **2.2.2.3 Hierarchical stratification, emergence and relationalism**

Further to their conceptualisation of stratified ontology, critical realists argue that the realm of *objects* is hierarchically stratified too. Suggested strata in this regard include the physical, biological, biochemical, the psychological and the social. On the basis of relational processes which are assumed to happen between these strata, Bhaskar (1993) postulates the concept of emergence which articulates the opinion that new things, over a period of time, come into being from things that are completely different from them. Concurring with Bhaskar, Sayer (2000) asserts that emergence takes place when two or more phenomena interact and give rise to a new phenomenon which is irreducible to either of its constituent elements. On this understanding, Bhaskar (1997b, p. 139) argues that "relational ontology" forms the basis of the theory of emergence:

Ideas and ideational connections (including category mistakes, logical contradictions and others) are part of everything, and everything is real. To deny the reality of a part of everything (of anything), such as ideas (or say person, or consciousness, or agency, or values or mind or body) extrudes or detotalises it or them from the world, that is of the rest of the world of which they are in principle casually explicable and casually efficacious parts.

Two sociological concepts, ‘substantialism’ and ‘relationalism’, constitute the discourse on ‘relational ontology’ (Emirbayer, 1997). In ‘substantialism’, sociologists advance the opinion that the world is made up of separate and distinct parts that are closed, self-sufficient, fixed, stable, durable and capable of self-action to the effect that interaction with other causal forces do not change them. On the other hand, ‘relationalism’ relates to the argument that the world is made up of parts that are related, connected, open, dynamic and capable of influencing each other in ways that are consequential.

The theory of emergence, as it relates to “relational ontology”, reinforces the theoretical framework drawn upon in this study which acknowledges that the object of study is “socially constituted” (Bhaskar, 1999; Archer, 2003), implying that it is located in particular social, cultural, political and economic contexts which it influences and is equally influenced by them. The probable consequence of such relational interactions is transformation effected on the object and its environment. In the case of this study, an analysis of the data gathered has the potential to generate models which could be implemented in clergy leadership formation programmes in ACSA towards a cultivation of collaborative and transforming practices (see Chapter Eight). As an example, the agential mediatory process (Archer, 2003) in this case may entail designing new policies to reinforce the current regulatory framework in clergy leadership formation programmes in ACSA. “Relational ontology” would come into effect when the designers (agents) of the new policies (structures) are guided and regulated by the products of their own making in future clergy leadership formation programmes and activities in ACSA.

#### ***2.2.2.4 Summary***

The scope and depth of critical realism cannot be contained in a limited space such as this chapter. The key aspects of the approach discussed above provided the study with theoretical tools for an in-depth analysis of the data gathered in response to the research questions outlined in Chapter One. In summary, the main distinguishing features of critical realism as discussed above are: (i) the claim that reality exists independent of our knowledge or sensory experience of it. This suggests that critical realism is ontologically bold but epistemologically cautious; (ii) it emphasises a stratified and differentiated ontology through the domains of the real, actual and empirical; (iii) it proposes that new, distinct and perhaps even unanticipated concrete phenomena emerge from differentiated strata of reality; (iv) in view of these

philosophical convictions and propositions, critical realism recommends careful scrutiny of underlying powers, laws and other causal mechanisms (rather than mere description of events) in order to get closer to understanding the nature of these emergent phenomena.

In order to raise the participants' consciousness about the underlying structural mechanisms that condition the facilitation of clergy leadership formation programmes in ACSA, this study draws on Cultural Historical Activity Theory (CHAT), which I discuss next.

## **2.3 CULTURAL-HISTORICAL ACTIVITY THEORY**

### **2.3.1 Introduction**

CHAT was initiated in the early 1920's by a group of Russian psychologists who were led by Vygotsky, initially, and Leontiev and others after Vygotsky had died. The concept is used by a variety of disciplines today (Nardi, 1996). The concept provides a theory and methodology to examine how groups of people with different experiences and perspectives working on the same project can work with new problems and jointly develop new knowledge or tools to address the problem (Engeström, 1987; 1999; Daniels, 2008). As such, CHAT theorists, also known as activity<sup>18</sup> theorists, acknowledge that “human activity can trigger tensions caused by systemic contradictions” (Engeström, 1987, p. 76). Kaptelinin and Nardi (2006, p. 31) affirm that CHAT “aims to understand individual human beings, as well as the social entities they compose, in their natural everyday life circumstances, through an analysis of the genesis, structure, and purpose of their activities”.

According to Sawchuk (2003), an activity system is the minimal meaningful context for understanding individual action. It consists of a group, of any size, pursuing a particular goal in an intentional and organised manner. Through activity systems, communities of practice conceptualise, plan, run and manage developmental programmes in context. This brings into the discourse socio-historical dynamics which I discuss in detail in Chapter Five and analyse in Chapters Six, Seven and Eight.

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<sup>18</sup>It is important to note that the true meaning of the word *activity*, as associated with the German or Russian word is, “doing in order to transform something” (Engeström, 2001, p. 1). The transformative nature of the ‘philosophy’ is here emphasised and is critical in this study.

In Chapter Two of his book, Engeström (1987) presents the elements of an activity system in CHAT as summarised below:

**Subject:** can be an individual or collective, pursuing a goal in a purposeful way. The subject's relation with the object is mediated by four elements, namely, rules, tools, community and division of labour. All these elements carry cultural meaning and historical development.

**Object:** is the orientation of the action being undertaken by the subject(s).

**Instrument:** the artefacts or tools (material or conceptual, including symbols and language) which have socio-historical implications in their development as discussed in Chapter Four and Five.

**Rules:** mediate the interaction between the subject and the community, as well as between the subject and the object.

**Community:** group of people who share the same object.

**Division of labour:** allocation of responsibilities to individuals or groups within the community of practice which mediate the relationship between the community and the object.

**Outcome:** desired outcome of working on the object.

### **2.3.2 CHAT conceptualisation of learning**

Fundamental to CHAT is the learning that happens through collective activities (activity systems) that are conducted towards a common object. Through the use of conceptual and material tools, the learning facilitated is aimed at empowering learners with transformative understandings of how they (we) ought to interpret and act on the world (Engeström, 2006; Daniels, 2008).

Edwards (2007) identifies three phases through which learning happens in alignment with the CHAT framework, namely:

- i) **Inter-mental (internalisation):** at a first experience of the community, the individual internalises what happens in this context or community regarding practices that are aimed at realising a common object.

- ii) Intra-mental (appropriation of knowledge): the individual learner processes the experience of the community, trying to make sense of the phenomena in its totality.
- iii) Inter-personal (externalisation): the individual learner input is complemented by what other members bring to the life and work of the community.

On the basis of these levels of learning, Edwards (2007, p. 259) emphasises that CHAT advances the understanding that learning in a community is a dialectical process whose primary purpose is to transform agential projects at both individual and collective levels (Engeström, 1987).

Edwards' views about learning encapsulate the five methodological principles of the CHAT framework, namely:

i) historicity – tracing the past and the future of the present activity. This entails asking questions such as: how did things come to be what they are currently? How can the past be a basis for improving the current status quo and preparing for the future? Virkkunen and Kuuti (2000, p. 73) assert that human development activities take place in contexts of “historically developed collective practice”. Engeström (1999, p. 8) argues that “local activity resorts to historically formed mediating artefacts, cultural resources that are common to society at large”. It would therefore follow that a given activity context is understood in light of its past. As such, one could surmise that the subjects in the current situation “are able to solve problems, complete tasks through the means created by previous generations” (*ibid.*). The stories of past situations could be drawn upon to inform the understandings of participants in the current activity context (Ross, Rix & Gold, 2005, p. 132). The relationship could be: subject-instrument-object, in which what is done and how it is done will be mediated through tools and signs. In the case of this study, these could be ACSA policies, rules, canons; Diocesan policies; clergy workshops (and others as introduced in Chapter One and discussed in detail in Chapter Five, Six, Seven and Eight) regarding what is and is not appropriate to the goal of developing transforming practices in the facilitation of clergy leadership formation programmes in ACSA.

ii) activity system is the unity of analysis which is depicted as a triangle as illustrated in Section 2.3.3.1 (Figure 2.5). According to Engeström (1987, p. 4), an activity system is “a systemic view of the relationships between the subject and the object of activity, mediated by

cultural means (tools and signs or instruments) and by division of labour, rules and communities”.

On the basis of work by earlier CHAT theorists such as Leontiev (1978; 1981) whose writings had been influenced by Marx’s (1976) theorisation of labour value, Engeström (1987) understood the *object* of an activity system as:

... two-fold: first, in its independent existence as subordinating to itself and transforming the activity of the subject; second, as an image of the object, as a product of its property of psychological reflection that is realised as an activity of the subject and cannot exist otherwise. (Leontiev, 1975, p. 52)

To elaborate this understanding, Engeström (1987) explains how the school text can be a contradictory object in the sense that it can be “... the object to be reproduced for the purpose of gaining grades ... cumulatively determin[ing] the future value of the pupil himself in the labour market [exchange value]. On the other hand, school texts also appear as a living instrument of mastering one’s own relation to society outside the school” [use value] (p. 102).

What is implied in the above, firstly, is that the *object* of an activity system has a life of its own on the basis of which it is able to control or determine the activities of the subjects towards its transformation, what Engeström calls *outcome* (1987). Secondly, *object* implies subjectivity in the activities, interests or understandings of subjects, what Engeström (1987) calls *motives*, “eventually understandable only when interpreted against the background of entire activity systems” (Engeström, 1999, p. 29). What this suggests, which I critically discuss in Chapter Seven, is that “activities are realised by goal-directed actions, subordinated to conscious purposes” (Engeström, 1987, p. 84-5). Accordingly, Engeström and Escalante (1995) explain that “the object should not be confused with a conscious goal or aim. In activity theory, conscious goals are related to discrete, finite, and individual actions; objects are related to continuous, collective activity systems and their motives” (p. 360).

Thus, the idea of object as motive in CHAT is useful in foregrounding the understanding that the way that subjects interpret an object will shape the way that they respond to it. In concurrence, Leontiev (1978) states that “it is evident that the activity of every individual *man* depends on his place in society, on the conditions that are his lot, and on how this lot is worked out in unique, individual circumstances” (p. 10). Similarly, Edwards (2011) explains that the subjects’ interpretation of the object will be determined and shaped by the social practices of the contexts in which objects of activity are located. As a matter of fact, each

individual involved in a common activity has a slightly different view and interpretation of the object and purpose of the activity depending on the individual's position in the division of labour, his or her history in the activity, training (formation) and experience (Warmington et al., 2006).

Thus, when the participants in the study (subjects) take action (activity system) within their environment (ACSA) in order to develop their diverse understandings of clergy leadership formation practices (purpose/object), the actors and artefacts become bound up and entangled in a web of activity (Ross et al., 2005, p. 132). Further, this would be mediated through psychological tools (signs, language) and material tools (physical instruments and artefacts), all having a historical origin and becoming meaningful and valued through their use in a culture. Therefore, through their use, the artefacts exert a cultural and historical influence in the given context, ACSA in the case of this study (see 6.2 and 6.3).

iii) In view of (ii), an “activity system” is characterised by collective effort or multiple voices which could be manifestations of personal views, interests or observance of cultural norms. The multi-voicedness of an activity system is a source of both tension and innovation.

iv) As a result of the multiple voices involved in an “activity system”, there are bound to be internal contradictions within the current activity (Engeström, 2001a). Since the “object of activity” is a collective effort, differences of opinion are bound to emerge between the subjects as they interact in their quest to actualise the desired outcome from the object. Beyond the subjects, contradictions may also be experienced between the other elements of the activity system, for instance between mediation tools and the subjects. In Section 3.3.3.3.1 I discuss in detail these contradictory possibilities in the CHAT framework and their implications to this study (refer to 7.2.3.1).

v) Paradoxically, the contradictions encountered in the process of collective input on a common object by the subjects are the driving force of development. Contradictions and tensions that arise during the mediation will provide the opportunity for learning, what Engeström (1999a) calls “expansive learning” which I discuss in detail in Section 3.3.3.3.3.

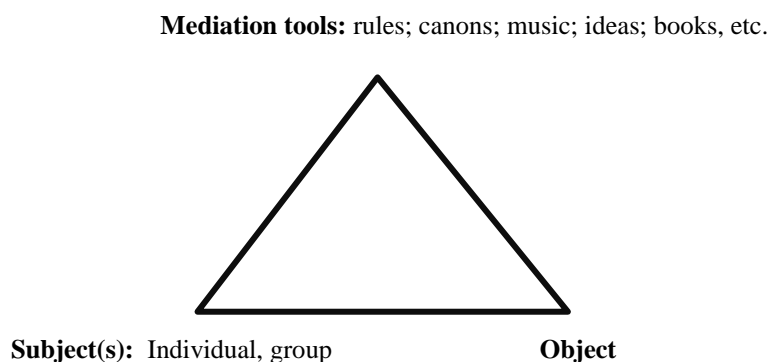
### 2.3.3 The three generations of activity theory

Activity theory has three generations. This study draws on the second and third generations. For purposes of providing a foundation to the presentation, I also cover the first generation in this discussion.

#### 2.3.3.1 First generation CHAT

The first generation, attributed to Vygotsky and Leontiev, consists of a triad subject – tool – object understanding of activity systems (Engeström, 1987). Vygotsky's concentration was on the mediation of culture, where the relationship between agential action (individual person) and cultural artefacts (tools) was analysed with the objective of resolving the individual/social dualism (which preoccupied research in psychology during his time) in order to establish a Marxist psychology (Edwards, 2005a). As elaborated under Section 7.2, Vygotsky's argument was that people learn from their culture and history by applying conceptual and material tools at their disposal in order to transform the object. A major breakthrough in his work was his argument to link the individual to the environment using tools for mediation moving away from the tradition of treating people apart from their cultures. Following after him, Leontiev shifted the focus from mediation tools to the object in the triad, arguing that activities are motivated by their object. This resulted in the establishment of the object-oriented nature of learning (Edwards, 2005a).

The diagram below illustrates Vygotsky's mediational triad (Engeström, 1987):



*Figure 2.4: Vygotsky's mediational triad (Engeström, 1987)*

An example of an application of first generation activity theory on ACSA clergy leadership formation programmes would consist of formators, deans of studies and ordinands as the subjects, who use diocesan clergy leadership formation syllabi and manuals, books and

internet materials as mediation tools. The object would be qualification in theology. Vygotsky's primary interest would have been in the clergy leadership formation syllabi and manuals, books and internet materials as these function to mediate the relationship between the subjects (formators and ordinands) and the object of their educational activities (qualification in theology). Contrastingly, Leontiev would have primarily been interested in how the object (qualification in theology) governs the formation programme activities between formators and ordinands.

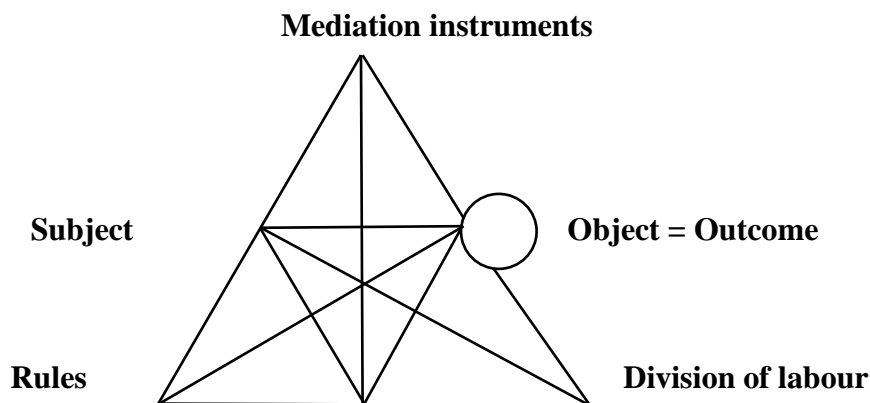
### ***2.3.3.2 Second generation CHAT***

After Vygotsky and Leontiev had died, Engeström developed the second generation activity theory on the basis of the latter's work, particularly his developmental initiatives on first generation activity theory. Leontiev had argued for an understanding that individual action is not only culturally mediated but also "always situated in the context of a historically developed collective praxis, an activity system" (Virkkunen & Kuutti, 2000, p. 300). This implied that individual meaning-making and action can only be understood in relation to a socio-cultural context, and how society is subsequently transformed by individual agency. On this understanding, Engeström went a step further to describe the concept as "second generation activity theory" (Engeström, 1987).

The importance of second generation CHAT is that it made real the interrelations between the agent or subject and his/her community (Daniels, 2001). In recognition of this, Engeström added relational concepts to Vygotsky's mediational triad which were community, rules and division of labour. These were relational concepts in the sense that the mediation of the subject's "agential projects" (Archer, 2003) happens in different ways at any given time. For instance, where it pertains to production, the agent needs tools; regarding exchange of goods, transactions are mediated by rules; concerning distribution of products, mediation would be in the form of distribution of labour (Engeström, 2001). Daniels (2001) explains that the main thing that differentiates one activity system from another is the difference in their objects. Additionally, Engeström (2001) elaborates that an activity system is heterogeneous and multi-voiced, as subjects construct the object of the activity system in different and conflicting ways due to perspectives which are informed by their histories and positions in the division of labour.

Going back to the illustration that I used in relation to first generation CHAT, rules would be needed to mediate the facilitation and management of the clergy leadership formation programmes and activities. The rules could be admission requirements for a person to be enrolled as an ordinand, duration of the formation programme, facilitation and assessment rules, formation guidelines, memorandums of agreements with partners, and others. The involvement of partners is an indication of the extensiveness of the object in terms of participation, implying the need for the mediation of community. Further to the responsibilities of facilitation, second generation CHAT would require the input of other personnel such as programme administrators who may include the programme secretary, discernment committee, programme marketing team, and others, implying the need for the mediation of division of labour. The purpose of mediation in activity theory is to maximise opportunities for actualisation of the goal of the object.

Below is an illustration of second generation CHAT:



*Figure 2.5: Illustration of second generation CHAT (Source: Adapted from Engeström, 1987)*

Engeström (1999) states that, because second generation CHAT's focus is limited to analysis of single activity systems, it is unable to engage with other activity systems. In response, Engeström (1999) proposed a third generation of CHAT which I discuss in the next section.

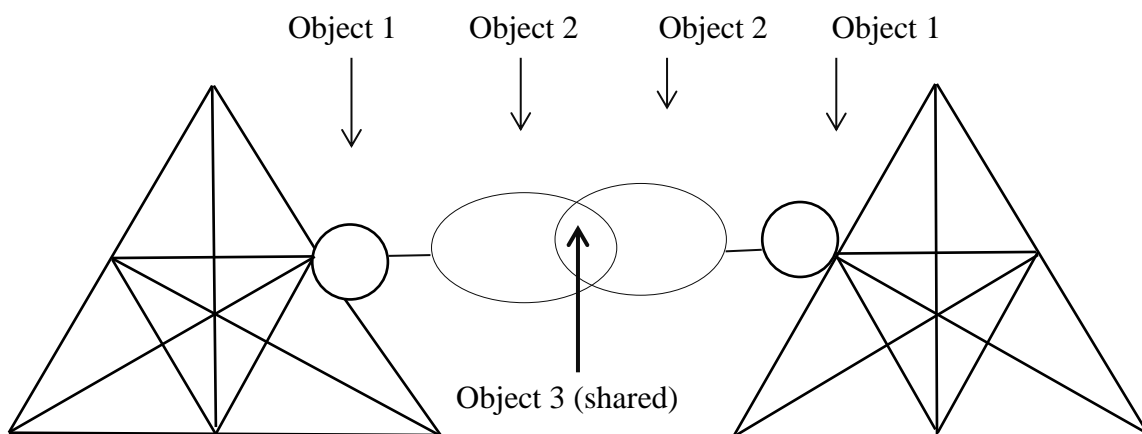
### **2.3.3.3 Third generation CHAT**

According to Edwards (2005b), third generation CHAT comes into being when two or more activity systems are in interaction. Building on second generation CHAT, third generation CHAT emphasises the networked and interactive nature of activity systems. Engeström (2001, p. 136) elaborates that the prime unit of analysis in third generation CHAT is a

“collective, artefact-mediated and object-oriented activity system, seen in its network relations to other activity systems” which, in their totality, constitute human activity. Edwards (2005) explains further that third generation CHAT motivates for a practical implementation of the transformative agenda which is the spirit behind the concept (CHAT) from its inception (Vygotskian mediational triad).

### 2.3.3.3.1 Contradictions within and between activity systems

As alluded to in Section 3.3.2, contradictions are “fundamental tensions and misalignments in the structure that typically manifest themselves as problems, ruptures, and breakdowns in the functioning of the activity system” (Virkkunen & Kuutti, 2000, p. 302). Contradictions are a form of disturbance or dissonance, what Engeström (2000, p. 964) calls “deviations from standard scripts”. According to Edwards (2005a), when contradictions are resolved, learning happens and a more advanced activity system emerges



**Figure 2.6: Illustration of two interacting activity systems as minimal model for the third generation of activity theory**

What is emphasised in this discourse is that transformative processes in activity systems come with tensions. In observance of this, Leont’ev (1978) and Engeström (1987; 2005) identify four types of contradictions: (1) those occurring within the elements of an activity system, for example within the community of an activity system (primary contradictions); (2) those occurring between the elements of an activity system, for example a contradiction between tools and division of labour of an activity system (secondary contradictions); (3) those occurring between the old and new way of doing things on the assumption that expansive learning and transformation within the activity occurs (tertiary contradictions); (4)

between the central activity system and any of its neighbouring activity systems (quaternary contradictions).

What is emphasised in this discourse is that transformative processes in “agential projects” (Archer, 2003) or activity systems, come with tensions. In observance of this, this Leont’ev (1978) and Engeström (1987; 2005) identify four types of contradictions: (1) those occurring within the elements of an activity system, for example within the community of the activity system (primary contradictions); (2) those occurring between the elements of an activity system, for example a contradiction between tools and division of labour of an activity system (secondary contradictions); (3) those occurring between the old and new way of doing things on the assumption that expansive learning and transformation within the activity occurs (tertiary contradictions); (4) between the central activity system and any of its neighbouring activity systems (quaternary contradictions).

Engeström (1987) asserted that CHAT is the ideal framework for allowing researchers to analyse activity as a continuous process of conflict and development, which does not have a linear cause-and-effect assumption. This study is concerned with how ACSA personnel (Deans of Studies, Training Rectors, Bishops, theological educators), will be able to develop alternative practices in their facilitation of clergy leadership formation programmes in their respective contexts within ACSA. This will entail the participation of these personnel in laboratory workshops organised to deal with the contradictions encountered between the activity systems involved in the facilitation of clergy leadership formation in ACSA (their workplaces) (as discussed and analysed in Chapter Five, Six, Seven and Eight).

#### *2.3.3.3.2 Boundary crossing in third generation CHAT*

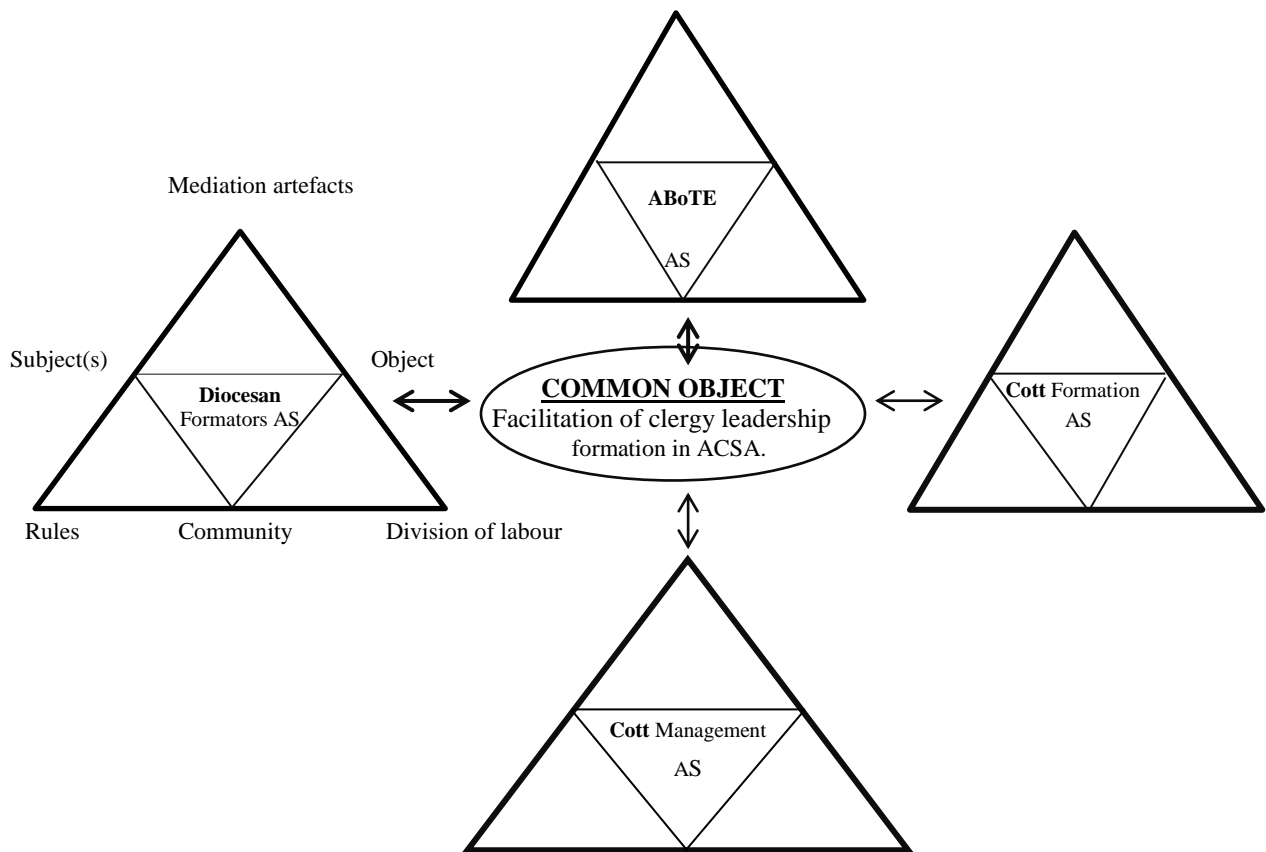
Engeström and Escalante (1995) explain that boundary crossing is mutual commitment towards working on identified areas of potential growth between interrelated activity systems. However, boundary crossing does not guarantee realisation of mutually desired results in a premeditated way. Potentially, the desired results can happen vertically through the hierarchy of an organisation or horizontally between people with different knowledge and expertise. In relation to tensions and contradictions in and between activity systems involved in this study, boundaries are understood as collaborative constructions that define subject involvement or non-involvement and knowledge or meaning system preference in interactions in a given “domain of focal enquiry” (*ibid.*, p. 320).

Facilitation of clergy leadership formation is a collaborative activity which calls for the recognition and appreciation of available expertise and provision of a platform where participants can engage on issues relating to their work (particularities about the common object) with the objective of building each other up in knowledge and skills (expansive learning) towards realisation of the goals and objectives of the organisation. In the case of ACSA, such collaborative work in the facilitation of clergy leadership formation would be aimed at the realisation of transforming clergy leadership formation practices (models). As such, the study undertook to involve two case studies with nested activity systems involved in clergy leadership formation programmes in ACSA as detailed in Chapter One and illustrated in Figure 3.8 (see Figure 4.1).

The following boundaries, in relation to the activity system networking as illustrated in Figure 3.8, were noted during the contextual profiling phase:

- Boundary of knowledge in formators of the nature, demands and expectations of the common object of their engagements (facilitation of clergy leadership formation);
- boundary of cultural and ethical practices amongst formators;
- boundary of information dissemination between the interrelated activity systems;
- boundary in cost-benefit analysis in utilisation of resources, particularly finances.

Through CLWs as detailed in Chapter Five and Six, clergy leadership formation facilitators engaged the identified boundaries towards transformation of their practices at both individual and organisational levels.



**Figure 2.7: ACSA facilitation of clergy leadership formation with different activity systems interacting around Common object (CHAT 3<sup>rd</sup> generation)**

This section has discussed the different phases that CHAT has undergone from Vygotsky’s artefact-mediated activity to Engeström’s third generation. This study is mostly guided by third generation CHAT as both a methodological and analytical tool due to the nature of the research focus (which investigates the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA and explores collaborative clergy leadership formation practices that can be expanded through learning).

Therefore, the study pursues the transformative potential of CHAT as provided for in Engeström’s (1997) theory of expansive learning which I discuss next.

#### *2.3.3.3.3 The expansive learning cycle (ELC)*

According to Engeström (1999b), the expansive learning concept works on the assumption that, given an enabling environment, understandings and perspectives about a particular phenomenon can be enhanced. The process would begin with a subject questioning the

accepted practice and gradually expand into a collective movement. Further, Engeström (2005) explains that expansive learning is built on overcoming current contradictions and tensions, drawing on the strengths of joint analysis and concrete transformation of current practice. Daniels (2001) adds that expansive learning involves doing, reflecting and improving the practice which, essentially, is praxis at one level, while at the same time it looks at how every day and scientific knowledge interact (refer to 7.2).

An important aspect about expansive learning, which is emphasised in this study, is that the practice entails collaborative learning, seeking in particular to address new and emerging problems, creating new knowledge and building local resilience. Expansive learning therefore emphasises that individual and collective learning takes place by going beyond the boundaries of individual subjectivity and, through immediate cooperation, towards the realisation of common interests of collective self-determination against dominant partial interests (Roth & Lee, 2007).

According to Engeström (2001) a crucial triggering action in expansive learning is found in the conflictual questioning of the current understandings of the focus of study. Participants produced questioning actions in their own voices which led to a deepening analysis of the situation that existed in the activity context (ACSA). Engeström (*ibid.*) points out that culmination of the analysis of the contradictions happens much later between the critical pathways and new object. The actions of the questioning and analysis process should be aimed at finding and defining problems and contradictions. Out of these discussions, a new direction or new directions could emerge which results in the formulation of a framework (modelling) of the new situation, a new pattern of activity (*ibid.*). The new model would be critically examined and then implemented which could result in the exposing of a whole new story of tensions and disturbances (new vs old).

Chapter Six details the expansive learning processes which were facilitated in this study in the form of CLWs and focus group discussions to determine how ACSA clergy leadership formation personnel are able to work collaboratively, adjusting their understandings of facilitation practices in clergy leadership formation, overcoming existing contradictions. The participants, when they assembled at Cott for their annual ACSA ministry and training (also known as TFM) consultation (as alluded to in Chapter One and detailed in Chapter Four, Five and Six), were involved in a variety of activities intended to help test and develop their

understandings of the focus of the study (clergy leadership formation practices). The activities sought to address new emerging problems that would create a new understanding of the research focus (Daniels, 2005).

The history of an institution or establishment is critical to an understanding of how things came to be what they are (*object*) and how expansive learning could be facilitated to enhance current institutional practices. Engeström (2011) calls this “formative intervention”. He explains that formative interventions should be “grounded in historical analysis of the activity system” and that empirical manifestations of contradictions in the on-going activity should be recorded and analysed as part and parcel of the intervention (Engeström, 2011, p. 611). Such an exercise would help to contextualise the contradictions which manifest within, between and across the selected activity systems of the organisation in question, ACSA in the case of this study (see 5.3 and 5.4).

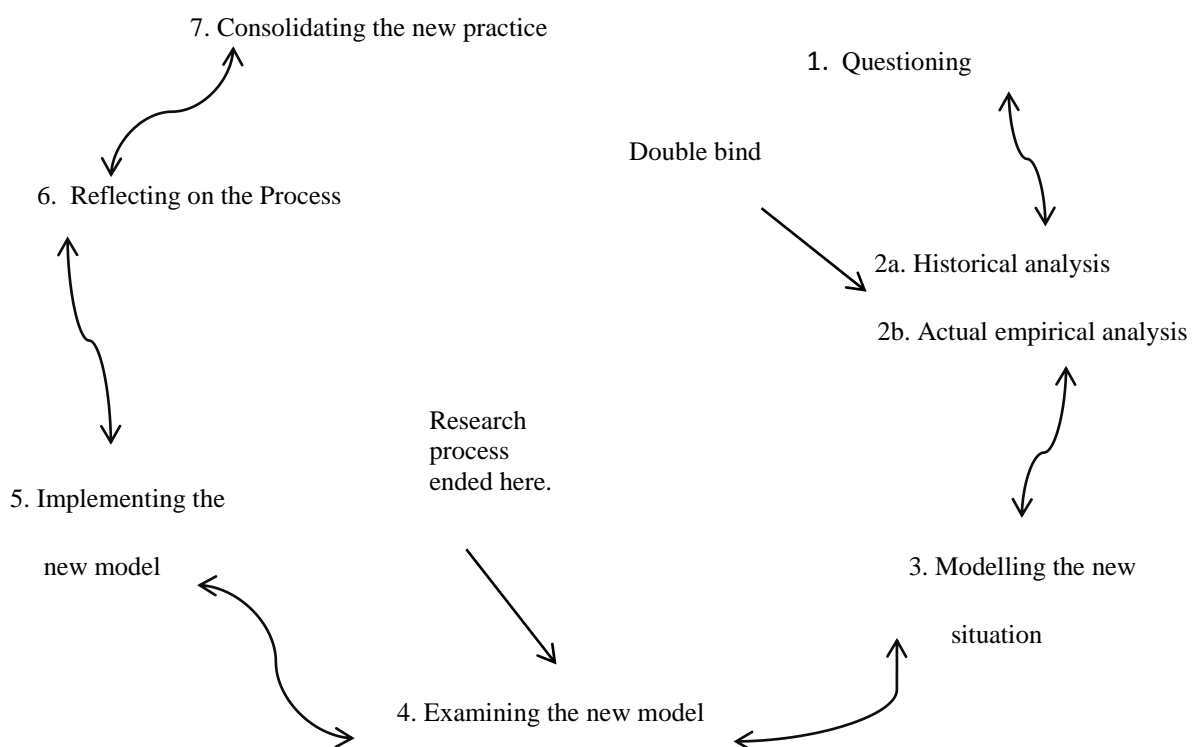
The importance of organisational history, in particular the histories of the activity systems involved, is thus underpinned in the above. On this understanding, Engeström reiterates that expansive learning, as a fundamental process of formative interventions, has the potential of transforming practices through what he calls *concept formation* (1987; 2001) which I develop in Table 6.1 on the basis of the data which had emerged from the research process (*mirror data*).

In section 6.2 I discuss the emphasis placed on practitioner and organisation development which happens through agential projects (Archer, 2003; Warmington *et al.*, 2005; Engeström and Sannino, 2010). Further to the discussion, Engeström asserts that “concept formation” is integral to this developmental process which requires multiple agential versions of the concept in question. In normal work practice settings, such deliberative engagements entail agential “confrontation and contestation as well as negotiation and blending” (2011, p. 611; see also explanation of CHAT framework in 2.3.2; also refer to 5.3 and 5.4). Because they are considered useful in framing organisational activities, institution related concepts and their meanings either develop and evolve (transformed) or remain the same (reproduced) with the passage of time (Hall & Greeno, 2008, p. 213; also see Bhaskar’s transformational model of human action in section 2.2.2.2.1).

In this study, the concept “clergy leadership formation” is fundamental to the work of ACSA from inception as explored and discussed in Section 4.4 and deliberated with research

participants through CLWs (see 6.3.1 and 6.3.2). The engagements demonstrated that contemporary socio-political dynamics in southern Africa, particularly South Africa, have a bearing on ACSA clergy leadership formation models. In view of this, Engeström explains that “the key implication of transformation of practice as concept formation is that the analyst needs to trace steps of expansive concept formation, from early unstable attempts and suggestions to stabilisation steps such as naming and modelling” (2011, p. 612). Table 6.1 demonstrates this understanding.

The expansive learning process is illustrated diagrammatically below:



**Figure 2.8: Expansive Learning Cycle (Engeström, 1999, p. 383)**

The process is detailed below:

**ACTION 1 - QUESTIONING:** The individuals are encouraged to question, criticise, or reject some aspects of the accepted understandings of the facilitation of leadership formation in ACSA.

**ACTION 2 - SITUATIONAL ANALYSIS:** This will involve the mental, discursive, or practical transformation of the situation in order to find out the causes or explanatory mechanisms, evoking “why?” questions and explanatory principles. This will be divided into two further

stages within this action, what Engeström (1999) calls “double bind” which is a contradiction between what is perceived to be and the reality on the ground.

**A. HISTORICAL ANALYSIS:** It will seek to explain the situation by tracing the understandings of leadership formation practices within the organisation’s origination and evolution.

**B. ACTUAL EMPIRICAL ANALYSIS:** It will aim to explain the situation by constructing a picture of the organisation’s inner systemic relations.

**ACTION 3 - MODELLING THE NEW SOLUTION:** The newly found explanatory relationship will be modelled through the use of publicly observable and transmittable means (workshops/focus groups) to construct an explicit, simplified model of the new idea that explains and offers a solution to the problematic situation.

**ACTION 4 - EXAMINING THE NEW MODEL:** The new model that has been created will be examined, run, operated, and experimented on in order to fully grasp its dynamics, potential, and limitations.

**ACTION 5 - IMPLEMENTATION OF NEW MODEL:** This phase will concretise the new model by means of practical applications, enrichments, and conceptual extensions.

**ACTION 6 - REFLECTION ON PROGRESS:** The participants reflect on and evaluate the process that has been developed making changes where necessary.

**ACTION 7 - CONSOLIDATION OF NEW PRACTICE:** The outcomes of the process are now consolidated into a new, stable form of practice.

Engeström (2005) suggests that expansive learning happens within three major and inter-related contexts, namely: the context of criticism which is concerned with powers of resisting, questioning, contradicting and debating (Chapter Five); the context of discovery which is concerned with powers of experimenting, modelling, symbolising, and generalising (Chapter Six); and the context of application which highlights powers of social relevance and embeddedness of knowledge, community involvement and guided practice.

The study, due to the research dynamics explained in Chapter Five which did not permit for a complete cycle of the process, focused its work in the contexts of criticism and discovery

which, according to Figure 3.9, goes up to Action 4. Beyond the scope of this study, it is assumed that the context of application will be championed by the research participants. Post-doctoral studies could also add value to the on-going implementation of the research findings.

### **2.3.4 Summary**

Methodologically, the study uses CHAT to organise the research activities into an activity system (3<sup>rd</sup> generation), providing a framework for a critical realist investigation of the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA and to explore collaborative clergy leadership formation practices that can be expanded through learning (as discussed in Chapter Six). As an analytical tool, CHAT functioned to assist me in examining and understanding the way the participants (clergy leadership formators) acted when they engaged, interacted and learned in developing alternative (transforming) understandings of clergy leadership formation practices in the context of ACSA (as discussed in Chapter Four and Five).

In the next section I focus on leadership theory which is a critical component of the theoretical framework of the study as explained in Section 1.6.

## **2.4 EDUCATIONAL LEADERSHIP THEORY**

### **2.4.1 Introduction**

The study falls within the field of Educational Leadership and Management, informed by leadership theories in both church and educational scholarship. The connection between educational leadership theory and clergy leadership formation practices in the context of the church (ACSA) is a critical issue in this study. Therefore, a discussion of educational leadership theory adds value to the conceptual framework of the study. Tye (2000) supports this perspective when she explains that in teaching and learning programmes, understandings of subject matter have direct connections with selected and implemented facilitation methodologies. Chapter Seven provides an in-depth discussion of this aspect of the study.

Educational leadership and management theories are born of industry and business (Bush, 2003). Drury (2003, p. 4) explains that:

Leadership has been studied since Confucius, Aristotle, and the Bible. The development of leadership research has progressed through a focus on *personality traits, leader style and behaviour, the group process, and the context of leadership.*

Scholars have identified *leadership as a power relationship, the exercise of influence* [own emphasis], an instrument of goal achievement or *the initiation of structure* [own emphasis].

Further, Drury (*ibid.*) states that most of the working definitions of leadership in literature have been reached on the basis of the key points which have been highlighted in the quotation above (words in italics). In line with the purpose of the study, a critique of the theoretical developments which have happened in the area of organisational leadership over the past hundred years creates a basis for an informed discussion of the connection between educational leadership theory (as a component of the methodological and analytical framework of the study) and clergy leadership formation practices in ACSA. For instance, the analysis entails the need to implement the theoretical framework of the study on the historical exploration of clergy leadership formation models in ACSA which was done in Chapter Two in order to surface the underlying mechanisms which have shaped and continue to shape clergy leadership formation practices in ACSA (see Chapter Eight).

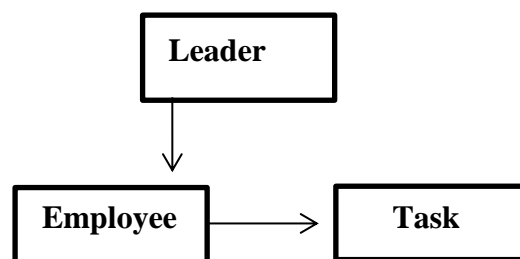
Since around the 1920's, a number of organisational leadership theories have been proposed. I discuss and critique the assumptions and values of some of these theories in the next section.

#### **2.4.2 Heroic models of leadership**

Heroic models of leadership, also referred to in literature as “leader focus” (Drury, 2003) models of organisational leadership, include trait theory (1920s-1940s), charismatic leadership theory (1940s), leader style and behaviour leadership theory (1950+) and others. The focus of attention in these theories is the leader, what Spillane, Halverson and Diamond (2004) call “leader-centric”. Trait theorists conceptualised leadership in the framework of the Aristotelian philosophy (‘Great man’ philosophy) arguing that leaders were born, thus assuming that “some people are natural leaders, endowed with certain traits not possessed by other people” (Yukl, 2006, p. 13). That belief was particularised in charismatic leadership theory where leaders with charisma were thought to have the capacity to motivate and influence followers (particularly in complex organisations and in times of crisis) to perform with commitment towards organisational goals (Weber, 1947; Sashkin & Sashkin, 2003). Robert House (1977) uses four phrases to define charismatic leadership which are: dominant, strong desire to influence others, self-confident, and strong sense of one’s own moral values.

Leader style and behaviour leadership theory emerged in the 1950s with an emphasis that leadership excellence ought to be understood in terms of *what leaders do* instead of *who they are* which had been the preoccupation of the trait theory. As such, the style or behaviour of the leader became the focal point of interest in the research activities of the time. For instance, The Ohio State Studies (1963) found that leader behaviour indicators suggested that “consideration” and “initiating structure” were common behaviours in research on leadership excellence. Based on these findings, Stogdill (1963) developed what popularly came to be known as the Leader Behaviour Description Questionnaire (LBDQ) still used today, for example in leadership development discernment processes as discussed in Chapter Four.

At about the same time, Weber and others made an observation that the obtaining leadership theories emphasised the exchange process in which leaders endeavoured to help followers accomplish organisational goals. Such a role has come to be known as transactional leadership. At the heart of the theory is the understanding that “leaders approach followers with an eye to exchanging one thing for another: jobs for votes, or subsidies for campaign contributions” (Burns, 1978 as cited in Greenfield, 2004, p. 175). The transactional leader works through creating clear structures whereby it is clear what is required of their subordinates, and the rewards that they get for following orders. It is apparent that transactional leadership uses the concepts in trait, behaviour, style and other theories developed in this period (Drury, 2003). In view of the above, heroic models of leadership could be summarised in the form of a diagram as below:



**Figure 2.9: Illustration of heroic models of leadership**

### **2.4.3 Leader-follower theories**

Leader-follower leadership theories which are estimated to have been developed in the 1960s are also referred to in literature as situational leadership approaches. At the heart of these theories is the belief that different situations demand different leadership approaches (Drury, 2003). Examples of leadership theories in this category are Fiedler’s contingency theory and

Hersey and Blanchard's situational leadership theory. In 1967 Fiedler gave an additional dimension to trait leadership theory by proposing the need to consider the entirety of a leadership context or situation, not just the leader's characteristics. Using a rating scale instrument "Least Preferred Co-Worker" (LPC), Fiedler analysed many leaders' styles and generated generalisations about what to do when a leader's style did not match the situation. According to Northouse (2001), Fiedler's theory is based on the assumption that leaders are either task-oriented or relationship-oriented. A task-oriented leader is motivated by achieving set goals, exhibiting a controlling or structuring style to get the job done. On the other hand, a relationship-oriented leader is motivated by developing close interpersonal relationships, exhibiting a passive or considerate style.

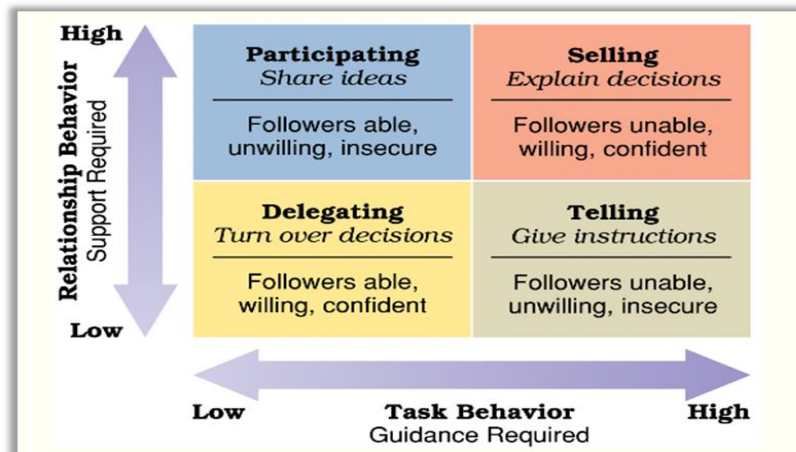
Unlike Fiedler's theory, Hersey and Blanchard's (1969) situational leadership theory "proposes that the leader adjusts his or her style to meet the particular situation and needs of the follower" (Drury, 2003, p. 27), working on the assumption that followers are at different developmental levels, thus the need to treat each follower differently. Therefore, the theory suggests an intuitive model of leadership in which the leader is required to be flexible in one's style after an evaluation of the follower's competence and commitment.

Drury (2003, p. 27) states that two main leadership activities emerge from this model of leadership which are "directive" and "supportive" where the former concerns with establishing or clarifying goals, making deadlines, establishing procedure, determining evaluation, all usually done in a one-way communication mode. The latter is concerned with problem solving, asking for input, praising, sharing information, and listening; thus, involving two-way communication most of the time.

On the basis of these two activities, Hersey and Blanchard postulated a grid that articulates four styles of leadership which are:

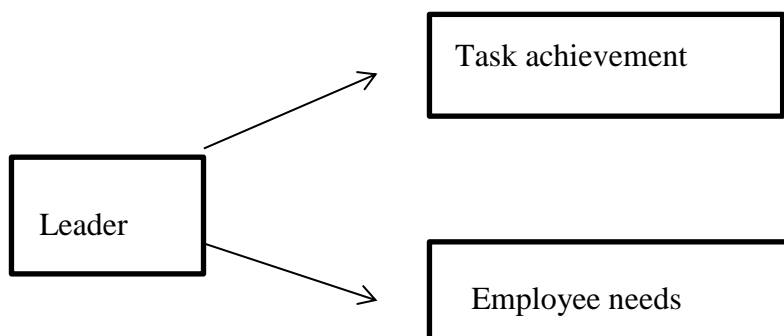
- a) directive/telling: where a leader gives specific directions and executes close supervision (high directive/low supportive);
- b) coaching/selling: where a leader explains decisions and provides opportunities for clarifications (high directive/high supportive);
- c) supporting/participating: where a leader solicits input and shares decision making (high supportive/low directive);
- d) delegating: where a leader turns over responsibility for decisions and completion of tasks (low supportive/low directive).

The model is illustrated below:



*Figure 2.10: Illustration of Hersey and Blanchard’s situational leadership model (adapted from Schermerhorn, 2011)*

Therefore, the theory proposes that developmental levels of followers should be focused on competence and commitment to the task. As such, “the highest level follower has the skills to do the job and the motivation to complete it” (Drury, 2003, p. 27). What this says is that for this process to be effectively done, careful diagnosis of the employee’s developmental level would need to be done. Two issues have been asked of Hersey and Blanchard to consider as weak areas in their theory: “unclear definition of the maturity or developmental levels and the impracticality of diagnosing and adapting leader style for one-to-one relationships with each employee or follower” (*ibid.*). The various perspectives of the leader-follower leadership theory discussed above could be summarised in the form of a diagram as in **Figure 2.11** below:



*Figure 2.11: Perspectives of leader-follower leadership theory*

#### **2.4.4 Positive forms of leadership**

In the mid-70s critical voices emerged in the field of organisational leadership and management, interrogating in particular whether the field was articulating matters enough relating to leadership. The discourse centred on the opinion that traditional literature on organisational leadership and management had tended to conflate leadership and management and equate leadership with headship, thus emphasising the functionalist understanding of the concept. Consequently, this reduced the purpose of research efforts in the field to supporting those who were in organisational leadership and management responsibilities (Milner, 1975; Calder, 1977; Argyris, 1979). In CHAT terminology, the unit of analysis had remained located in the solo leader. It was therefore convincing to argue that the traditional research approach in the field had run its course. Therefore, there was need for a re-orientation of the prevailing discourses regarding the concept so as to emphasise its educative, transformative, ethical and empowering values (Greenleaf, 1977; Russell, 2001; Ford, 2005; MacBeath, 2005; Simkins, 2005; Yukl, 2006).

In 1977 Robert Greenleaf developed what has come to be known as servant leadership theory. It is believed that Greenleaf developed the theory after reading Herma Hesse's (1956) mythical story *Journey to the East* in which a character, Leo, performs the most menial tasks for his travelling companions. It was after Leo had got lost that it was discovered that he had been the discrete leader who had sponsored the journey (Drury, 2003). Greenleaf sought to apply the lessons drawn from the book to organisational leadership and management. He felt "business exists as much to provide meaningful work to the person as it exists to provide a product or service to the customer" (p. 142).

Greenleaf and other theorists who came after him emphasised that servant leadership facilitates an environment where both the needs of the organisation and those who serve the organisation (workers) are prioritised. However, Patterson (2003) explains that "servant leaders' highest value is the people; organisational results are secondary outcomes" (p. 78). Adding to this opinion, Farling, Stone and Winston (1999, p. 3) assert that "serving is not the means by which to get results, but the behaviour of serving *is* the result". The key constituents of the theory include: value placed on people; the commitment to develop people; the value of building community; integrity, trust, openness, accountability; visionary leadership and shared leadership (Laub, 1999).

In 1978, Burns' ideas in his book *Leadership* developed the theme of selflessness in leaders which is central to servant leadership theory and a contrast to the thrust of transactional leadership as discussed under Section 3.4.2. Burns' ideas culminated in what has come to be known as transformational leadership theory where the leader has the capacity to recognise and exploit an existing need or demand of a potential follower in a given context. Beyond that, the leader looks for personal motives in followers, seeks to satisfy higher needs, and engages the full person of the follower, thus emphasising practice of power through people and not over people. The practice of transformational leadership results in "a relationship of mutual stimulation and elevation that converts followers into leaders and may convert leaders into moral agents" (Burns, 1978, as cited in Greenfield, 2004, p. 176), like servant leaders as discussed earlier.

Therefore, transformational leadership theory was a new way of thinking and talking about leadership which heralded a broadened, holistic understanding of the concept. Whereas traditional theories on leadership rested on "social contract" between leaders and organisational members as discussed under Section 3.4.2, transformational leadership theory broke with "task-person tension", acknowledging the inseparability of leadership practice with its socio-historical context (French & Bell, 1995; Yukl, 2006).

Further to transformational leadership, scholars such as Shields (2003) have taken seriously Burns' (1978) conviction that "transcending leadership is leadership engaged" (Shields, 2009, p. 55). This gave birth to a new type of leadership theory called transformative leadership. Shields (2009, p. 55) elaborates that the thrust of transformative leadership is "the need to challenge inequity ... [so as] to address the continued impact of systemic discrimination". Fundamental to this quest is the commitment to transformation at individual, organisational and societal levels on the basis of the following values: dialogue, inclusiveness, liberation, democracy, equity, equality and justice (Shields, 2003; 2009; 2010; Mafora, 2013).

The transformatory underpinnings of the methodological framework of this study (critical realism; CHAT) as discussed under Section 3.2 and 3.3 respectively, connect significantly with the goals and values descriptive of transformational and transformative leadership theories.

## 2.4.5 Distributed leadership theory

Distributed leadership emerged in the mid-1990s as an outright contrast to traditional “leader-centric” models of organisational leadership (as discussed in 3.4.2), offering an alternative perspective of the concept as “concertive action” meaning that it is a shared “commodity” amongst organisational members within and without the organisation. The understanding is that leadership is not a preserve for a few but is “available for grabs” by all involved in organisational activities (Gronn, 2000; Spillane et al., 2004). Understood thus, distributed leadership, as do transformational and transformative leadership theories as discussed above, aims to deal with injustice in organisational leadership practices by emphasising agential legitimacy and potentiality in organisational members.

Further, Spillane et al. (2004) avers that distributed leadership also calls for the need to incorporate non-human aspects which have causal implications on the life and work of the organisation such as infrastructure and planning processes, thus suggesting balanced structure-agency interplay and purposive interaction in organisational activities within a specified socio-historical context.<sup>19</sup> The CHAT framework, with its emphasis on mediated action (activity system), connects well with this conceptualisation of organisational leadership. In relation to the observation, Woods (2004, pp. 5-6) writes:

Activity theory emphasises social life as a continuous flow of mediated activity; a process of ever-moving relationships between technologies, nature, ideas, persons and communities, in which the focus of action circulates to one person, then another according to the social and environmental context and the flow of action within this.

The acknowledgement of the causal effect of other actors in the wider context of the organisation (Spillane et al., 2004) characterises distributed leadership with an expanded unit of analysis (3<sup>rd</sup> generation discussed in 3.3.3.3). In the case of this study as presented in Chapter Four and Five, such actors would include, for example, owners of organisations who host Cott students when they go on “exposure visits” or external assessors of students’ written work. In a number of cases, these external collaborators are not necessarily members of ACSA but are willing to make an input into the formation programme of the College (Cott) and the Anglican Church at large.

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<sup>19</sup> Socio-cultural historical perspectives are of critical importance to development and learning. In relation to CHAT as implemented in the study, a detailed discussion of socio-cultural historical perspectives will be done in Chapter Seven.

In the same way that transformational and transformative leadership theories are context bound, distributive leadership is practice focused, emphasising the need to acknowledge and value input given by individual members in the work of the organisation. As such, “distributed leadership is represented as dynamic, relational, inclusive and collaborative” (Bolden, Petrov, & Gosling, p. 259), implying openness to organisational change where deemed necessary particularly where it concerns styles of leadership and vision casting.<sup>20</sup>

The difficulty though is that leaders who open up opportunities for others in the manner as suggested by this theory are rare. As such, a critical question to ask about this theory in connection with the purpose of this study is: how practical are the assumptions or beliefs of the model when applied in the context of the church, ACSA in particular? In addition, the theorists of this model, as do those of preceding organisational leadership theories, do not problematise the power that is embedded in organisational leadership practices (Gillies, 2013; Lumpy, 2013). According to Hartley (2010, p. 279), the theory “renders discriminatory practices invisible. Just as a child shutting her eyes believes she has removed a threat because it is no longer visible, so distributed leadership removes inequality ontologically ... a little more than an emancipatory rhetoric”. What is lacking in this theory is an acknowledgement and interrogation of the existence of power dynamics in organisational leadership, hence the recourse to social theory by the critics in the field, which I discuss in the next section.

## **2.5 SUMMARY**

In view of the discussion above, it is feasible to conclude that over the past century, different schools of thought have emerged with divergent but converging understandings of organisational leadership. Van Tonder (2004, pp. 16-17) observes that these schools of thought “were reactions to the inherent inadequacies of the preceding schools ... organisational theorists were located in a particular time-frame and environment and their perspectives were clearly influenced by the reigning scientific, political and cultural forces of their time”. Yukl (2006, p. 272) adds that “although clothed in different jargon, some of the new wisdom (inherent in the so-called new theories), reflects themes that can be found in earlier theories of organisational leadership”.

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<sup>20</sup>As discussed in Section 3.2.2.2.1, Bhaskar’s transformational model of human action is premised on similar agential or organisational commitment, which consolidates the complementarity of the conceptual frames of the study (critical realism, CHAT and leadership theory).

It can therefore be concluded that thinking in theoretical shifts in the field of organisational leadership are not clear cut. However, what is strongly evidenced in these theoretical shifts is the inclination towards transforming leadership models characterised by “freedom [that] enables actors to participate effectively in shaping the boundaries that define for them the field of what is possible” (Hayward, 1998, p. 12). How that “freedom” ought to come about is the preoccupation of contemporary scholarly engagements in the field, particularly their commitment to interrogate understandings of power in educational leadership and management. In the next section, I discuss the critical views emerging in the field, informed by social theory.

## **2.6 CRITIQUING LEADERSHIP THEORY: RECOURSE TO SOCIAL THEORY**

Contemporary scholarly work in the field of educational leadership and management, particularly the writings of Jacky Lumby, Helen Gunter and Donald Gillies, take recourse to social theory in order to articulate incisively the critical challenges encountered in the field. Lumby (2013) is of the opinion that the field is currently in a *cul-de-sac* particularly where it pertains to conceptualisation of a relevant and practically applicable educational leadership theory. Basing their arguments on the perspectives of social theorists such as Michel Foucault and Pierre Bourdieu, the educational leadership theorists critique the manner in which power has not been problematised in “leader-centric” theories. Lumby’s (2013, p. 581) concerns about the latest organisational leadership theory (distributed leadership theory) capture the contemporary scholarly views about the field:

In about a decade the theory of distributed leadership has moved from a tool to better understand the ecology of leadership to a widely prescribed practice. The concept offers an enticing suggestion of including more in leadership, and even sometimes including staff members equally. The resulting issues around distribution of power are largely ignored or referred to in passing; a kind of inclusivity lite, which does not engage with, for example, issues of gender or ethnicity. It is suggested that opportunities to contribute to leadership are not equal and that distributed leadership remains silent on persistent structural barriers. The theory’s confusions, contradictions and utopian depictions are ... profoundly political phenomenon, replete with the uses and abuses of power. The conclusion suggests that the effect of distributed leadership theory is to maintain the power status quo.

Lumby’s critique is a direct response to the opinion advanced in distributed leadership theory regarding the manifestation of power in organisational leadership which hinges on what Acker (1990, p. 149) calls notions of a “disembodied worker”. Rather, the social theorist argument is that “workers are not disembodied. They operate within complex structures

(deeper systemic issues) of power that create and constrain their opportunities to lead” such as race, gender, age and others (*ibid.*); social boundaries which define and regulate social action (Wacquant, 2014). These constitute what Bourdieu calls “habitus”<sup>21</sup>. As such, to understand power in organisational activities and processes as a “commodity” as asserted in distributed leadership theory would be tantamount to suggesting that it is something that can be passed around from one person to another when and where it is felt necessary and needed (Lumby, 2013). Further, it would imply that at any given time, power can be located in an individual or individuals, thus making them “powerful” members of an organisation (*ibid.*).

Elaborating on Foucault’s conceptualisation of power, Arendt (1970, p. 44) explains that it is a misnomer to understand power as “the property of an individual; (rather) it belongs to the group and remains in existence only so long as the group keeps together. When we say of somebody that he is in power, we actually refer to his being empowered by a certain number of people”. This affirms the social theorist opinion that organisations are “fields<sup>22</sup> of power; never politically neutral; reflecting the power laden nature of all human association” (Deetz, 2000, p. 144). Put otherwise, the assertion is that power in organisations exist in and through relationships, implying that it is “fluid”, “ubiquitous”, “pervasive” and always “fluctuating” (Hayward, 1998, p. 21).

Power may be conferred on individuals but that is only one way through which it is expressed; it has many other forms of manifestation. In addition, power cannot be domesticated in individuals or certain groups of people in the organisation (*ibid.*). Therefore, the current theoretical thrust in educational leadership proposes the need to “look beneath the apparently untroubled surface of organisations” (Deetz, 2000, p. 145) in order to ascertain the

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<sup>21</sup>According to Wacquant (2014, p. 316) Bourdieusian *habitus* “is the way society becomes deposited in persons in the form of lasting dispositions or trained capacities and structured propensities to think, feel and act in determined ways which then guides them”. Understood thus, questions that would be relevant about people are: who are you as a person? In what ways does one’s identity express one’s upbringing? What this suggests is that it is important for every community or organisational member to know one’s “habitus”. Therefore, it could be said that in the context of organisational leadership such as applies to ACSA, it is important for leaders to know the “habitus” of each and every member of their organisation for developmental purposes in line with the goals and aspirations of the organisation. In addition, “habitus” is embedded in institutions (Bourdieu, 1990).

<sup>22</sup>In Bourdieu’s conceptualisation of power, *fields* “are the various social and institutional arenas in which people express and reproduce their dispositions, and where they compete for the distribution of different kinds of capital” (Gaventa, 2003, p. 6). Foucault calls these “sites of all kinds and sizes, including the most minute and most intimate, such as the human body” (Hayward, 1998, p. 35). This assertion reinforces the social theorist understanding that power is “relational” and “contested”, implying involvement of individuals in or exclusion from deliberations critical to the work and life of the community or organisation on the basis of the “cultural capital” that individuals possess. Chapters Four and Five discuss the “fields” experienced during the data gathering phase of this study which include laboratory workshops and focus group discussions facilitated.

power structures which may have caused and continue to sustain the way organisational leadership is understood and executed (compare with critical realist thrust in Section 3.2).

Further, Foucault differentiates between power and authority, asserting that power is relational and negotiated; implying working with, to, and within (VeneKlasen & Miller, 2002) as opposed to power over<sup>23</sup>, which is an expression of “episodic agency ... where sovereign agents overcome the wishes and resistance of others in order to achieve their will” (Lukes, 1994, p. 123). In the former, authority is exercised and power expressed in transformational ways; and in the latter, it is the exercise of manipulative, coercive and abusive power (VeneKlasen & Miller, 2002).

Adding to the discourse, Gillies (2013) wrote a useful book on educational leadership and management with a premise on Foucauldian themes which include what Foucault calls “genealogy”. This is a conceptual tool which interrogates the historical emergence of philosophical and belief systems cultivated in particular cultural or organisational practices (*ibid.*). It suggests that “genealogy” has the potential to enable a concerned community or organisation to analyse the relationship between what is known and practised (knowledge), what Bourdieu calls “capital”<sup>24</sup>; the nature of power relationships which have been lived out and shaped through organisational activities with the passage of time, what Bourdieu calls “habitus”; and what has been used (mediation artefacts) to sustain the organisational practices over the years (Gillies, 2013). Ultimately, “genealogy” challenges organisational members to

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<sup>23</sup>“*Power to* refers to the unique potential of every person to shape his or her life and world. When based on mutual support, it opens up the possibilities of joint action, or *power with* ... each individual has the power to make a difference. *Power with* has to do with finding common ground among different interests and building collective strength. Based on mutual support, solidarity and collaboration, *power with* multiplies individual talents and knowledge. *Power with* can help build bridges across different interests to transform or reduce social conflict and promote equitable relations. The most commonly recognised form of power, *power over*, has many negative associations for people, such as repression, force, coercion, discrimination, corruption, and abuse. Power is seen as a win-lose kind of relationship. Having power involves taking it from someone else, and then, using it to dominate and prevent others from gaining it. *Power within* has to do with a person’s sense of self-worth and self-knowledge; it includes an ability to recognise individual differences while respecting others. *Power within* is the capacity to imagine and have hope; it affirms the common human search for dignity and fulfilment. Many grassroots efforts use individual storytelling and reflection to help people affirm personal worth and recognise their *power to* and *power with*. Both these forms of power are referred to as agency – the ability to act and change the world” (VeneKlasen & Miller, 2002, p. 55).

<sup>24</sup>The usage of the term “capital” in Bourdieu’s conceptualisation of power in organisations extends beyond material possessions to capital that may be cultural, social or symbolic (Bourdieu, 1986 as cited in Navarro, 2006). This implies diversification of power dynamics in an organisation. Individual members of organisations would be required to *bring something to the table* (some form of “capital”) if they are to have any influence in the functions of the organisation, particularly where it concerns decision making. In relation to ACSA, age is an example of a form of “capital” which is observed in leadership formation practices. The consideration comes with a number of challenges (see Chapter Four and Five).

reflect on current practices with the goal of establishing strategies to expand their knowledge on those organisational practices (Foucault, 1988) (compare with CHAT framework in 3.3).

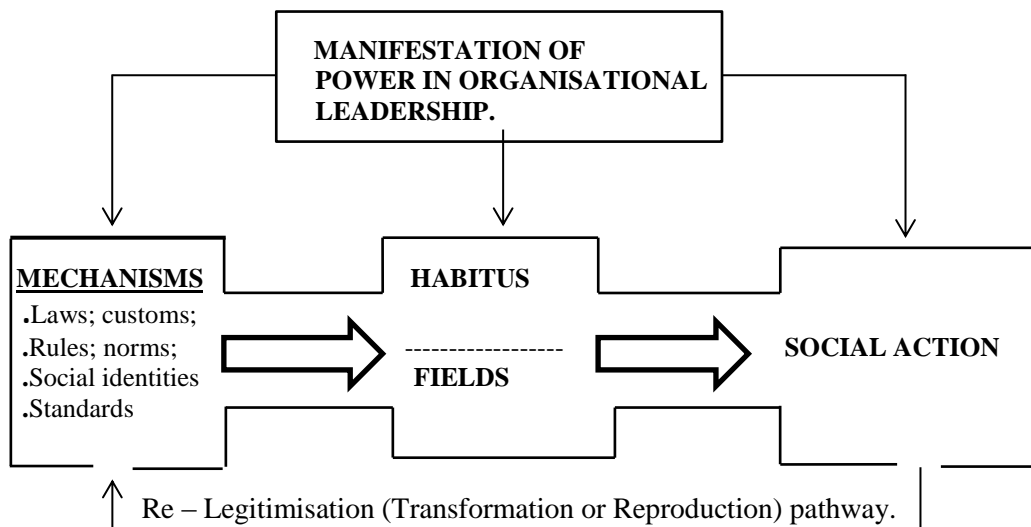
The contribution of social theory to a critique of educational leadership theory deepens the discourse to a fundamental premise that questions “the idea that power is an instrument used by the powerful to limit the freedom of the powerless” (Hayward, 1998, p. 12) and that “power is necessarily exercised in an exchange between two people or groups” (*ibid.*, p. 18). Instead, the critical perspective observes that human beings in communities or organisations are socialised into identities, choices and actions which, ultimately, determine the possibilities at their disposal for freedom<sup>25</sup> (*ibid.*, p. 12; see 7.2). As such,

Critical questions about how power shapes freedom are not, then, reducible to questions about distribution and individual choice. Rather, they are questions about the differentiated impact of social limits to human action on people’s capacities to participate in directing their lives and in shaping the conditions of their collective existence. (*ibid.*, p. 22)

As such, the conceptual and practical implications of this critique on educational leadership theory are for “a shift in focus along a possible spectrum of power, moving away from overt forms of domination ... toward the relative capacity for action on the norms and boundaries that make this possible” (*ibid.*, p. 23). As discussed under Section 3.2 and 3.3, critical realism and CHAT are founded on a similar transformatory agenda. It is within this framework that data gathered in this study was analysed (see Chapter Six, Seven and Eight). The Foucauldian and Bourdieusian conceptualisations of power in organisational leadership as discussed above could be presented diagrammatically as follows:

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<sup>25</sup>“Freedom ... is the capacity to participate effectively in shaping the social limits (power mechanisms) that define what is possible” (Hayward, 1998, p. 22). If an organisational member does not have the required “capital” (an inadequacy in “habitus”), one is limited in terms of participation in important organisational activities such as decision-making (happening in the “fields”).



**Figure 2.12: Illustration of a transformed understanding of organisational leadership based on Bourdieusian and Foucauldian conceptualisations of power and authority**

In this limited section of the study, it is not possible to exhaust the Foucauldian and Bourdieusian conceptualisations of power as used by educational leadership theorists in their critique of the field. The value which a social theorist perspective of leadership brings to the study, together with CHAT and critical realism research orientations, is the creation of an aligned conceptual framework whose foundation is liberative, transformational and transformative.

## 2.7 ALIGNMENT OF RESEARCH THEORETICAL FRAMEWORK

CONCEPTUAL FRAMEWORK ALIGNMENT				
DOMAINS OF REALITY	RESEARCH QUESTIONS	CRITICAL REALISM	LEADERSHIP THEORY	CHAT
	What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?	<p><b><u>Ontological orientation</u></b></p> <p>Acknowledgement of the existence of a world independent of our knowledge with structures which generate causal mechanisms when triggered. Examples of such mechanisms are: laws; norms; race; traditions; gender; ethnicity; age; and others: (“Habitus” expressed in “fields”).</p> <p><b><u>Epistemological orientation</u></b></p> <p>Fallibility of knowledge: there is more to life than what is known and experienced in the actual and empirical domains. The challenge therefore is to aim to penetrate behind the surface of</p>		

<b>REAL</b>		<p>what is experienced or perceived in order to unearth the forces behind those surface manifestations. Where needed, the goal of such an undertaking is to transform those structures or mechanisms which limit the freedom of some members of the community or organisation to participate fully in activities and processes which define the conditions of collective existence.</p> <p>Agential projects (object) are always socially constituted, implying attachment of socio-cultural meanings to the projects in terms of how they are done. The <i>how</i> embraces methods and artefacts used. As such, in order to fully understand agential projects, one would need to do a historical trace of their origins and development over the years.</p>
<b>ACTUAL</b>	What learning in facilitation of clergy leadership formation takes place among different participants in ACSA?	Events or activities can be experienced or observed in day to day agential engagements. However, experiences or observations of these activities or events do not necessarily imply that everything about the phenomena has been exposed, hence the need to acknowledge the existence of a world independent of human knowledge which is located in the domain of the “basal” (real).
<b>EMPIRICAL</b>		
		<p><b>GOAL (ultimate purpose)</b> – Transformational, transformative agenda: liberation; empowerment of humankind.</p>

**Table 2.1: Research conceptual framework alignment (explained in Chapter Seven as Vygotskian orientated)**

Thus, CHAT is used in the study as a methodological and an analytical tool to enable participants to model solutions to address the contradictions faced in their practices. In addition, CHAT, with the support of a critical theorist understanding of leadership as discussed above, provides guidance for me in the consideration of learning processes in my facilitation of participant expansive learning activities (see 6.2 and 6.3). I employ critical realism whose interest is the domain of the real (refer to 2.2.2) as an *underlabourer* to complement CHAT in unearthing deeper causal mechanisms in the analysis and interpretation of participant deliberations and activities regarding clergy leadership formation practices. Therefore, using CHAT and critical realism in this study offers me greater chances of achieving ontological and epistemological depth in the analysis and interpretation of what participants say and do and the possible reasons for their choices and actions in their practices.

## **2.8 CONCLUSION**

This chapter discussed the theoretical framework that underpins the study with a focus on the selected philosophical and epistemological theories, demonstrating how they relate to each other. Critical realism, in concurrence with the social theorist critique that foregrounds current scholarship in the field of educational leadership and management, provides a philosophical premise for an investigation of the causal mechanisms that have shaped and continue to influence facilitation of clergy leadership formation in ACSA with the objective of exploring possible learning opportunities that have the potential to expand the current practices in both knowledge and methods. In addition, CHAT provides a basis on which the knowledge claims embedded in research processes and activities in terms of understandings and practices are interrogated. Consequently, the structures and mechanisms which give rise to observed phenomena are discerned, thus enabling retroductive analyses in Chapter Eight (see critique of the effectiveness of the critical realist concept of under-labouring in the study in Section 7.2.3).

The next chapter discusses the methodology that was used in the study and links it to both the theoretical framework and the research questions which are being responded to in this study. The chapter discusses how data was generated, gathered, analysed and processed and some of the researcher reflexivity which happened in the process.

## **CHAPTER THREE: METHODOLOGY AND METHODS**

### **3.1 INTRODUCTION**

In this chapter I discuss how I engaged with research participants to generate and gather data. I also discuss how I handled and analysed the data in line with the research questions (see 1.5) and the theoretical framework as discussed in Chapter Three. As such, all data collection engagements in the study were structured and facilitated in ways that enabled collaboration between the research participants and me. This necessitated forging focused and reflexive work partnerships with the research participants with the goal of investigating the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA and an exploration of collaborative clergy leadership formation practices that can be expanded through learning. In this sense, I was an interventionist researcher endeavouring to enhance the agency of participants (ACSA clergy leadership formators) (Engeström, 2008).

The first section of the chapter discusses the methodological framework of the study which is followed by a discussion of how the research unfolded over two phases. The methods which were employed in data generation and gathering are discussed next. The research goals (see 1.4); conceptual framework (see 1.6.3) and theoretical framework (see Chapter Two) guided me in choosing a more effective research methodology/design and appropriate data gathering methods. Further, the chapter discusses how I sought to maintain trustworthiness throughout the study, and how I ensured that ethical protocols were observed.

The chapter ends with a discussion of the processes of data management and the analytical processes which I employed in the analysis of the research data.

### **3.2 METHODOLOGICAL FRAMEWORK**

In view of the above, the study had an emancipatory interest to enhance the agency of the research participants in relation to the learning and practice of transforming leadership models in clergy leadership formation programmes in ACSA (see 7.3). As discussed in Chapter Two, CHAT and critical realism provide theoretical and methodological tools with which to facilitate transformative learning in organisational work practices which, in the case of this study, is clergy leadership formation. In Section 1.6.2 I mentioned the methodology used within the CHAT framework known as Developmental Work Research (DWR). I discuss

this methodology in the next section as it relates to the manner in which I interacted with the research participants in their quest to learn more about transforming clergy leadership formation practices and activities in the context of ACSA.

### **3.2.1 Developmental Work Research**

According to Engeström (2008) expansive learning is at the heart of DWR methodology. <sup>26</sup>Edwards' (2007) three learning phases as discussed in Section 2.3.2 foreground the understanding of *development* in DWR where the focus is not limited to the collective group (inter-personal), what he also calls "relational agency" (Edwards, 2005, p. 1), but extends to the interests of each individual participant (inter-mental and intra-personal phases). Therefore, DWR methodology, through the interventionist role of the researcher, creates opportunities for people-centred learning aimed at personal (agential) and organisational (activity system) development.

Extending beyond Edwards' (2008) three developmental learning phases, Sannino (2008; 2011) asserts that the ultimate test of the learning accrued through DWR methodology is how it would help participants to grapple with the pressing issues that humankind is facing in context at any given time. In the case of ACSA clergy leadership formation programmes, Sannino's thought would find relevance in relation to the aimed for model of clergy leadership which was explained as "deeply ethical, moral and visionary ... for service in the wider community including business, government and other parts of society that seek moral, ethical, and spiritual direction in dealing with injustice and inequality" (Archbishop Thabo Makgoba in *Report on development of ACSA Vision and Mission Statement*, September 2010, p. 2).

DWR methodology allowed me to be both a researcher and a participant (see 7.3). However, my main responsibility in the interactions in accordance with the expansive learning circle as discussed in Section 2.3.3.3.3 was to facilitate enquiring discussions on learning in clergy leadership formation programmes in ACSA and how current practices on the subject could be expanded on the basis of the theoretical and methodological tools shared with the

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<sup>26</sup> Acknowledging the understanding that DWR is a special type of case study (Warmington et al., 2005), it needs to be explained that in this study, this intervention methodology is used within the multi-case study methodology employed in the study as discussed in 3.2.2.

participants. Further, in observance of the guidelines given by Engeström (2000) on the role of an interventionist in expansive learning, it was also my responsibility to take a systemic view of how the interactions in the activity systems were unfolding with the objective of reflecting the proceedings to them at a later stage as mirror data (see 3.4.2.2).

### **3.2.2 Case study as a research methodology**

Hancock and Algozzine (2006, p. 9) define a case study as “an intensive analysis and description of a single unit or system bounded by space and time which helps researchers to gain in-depth understanding of situations and meaning for those involved in the case”. Danemark et al. (2002) reinforces that a case study forms an empirical basis for studies that have intensive designs and contribute uniquely to our knowledge of individual, organisational, social, and political phenomena. This qualifies case study methodology as contextually situated, “particularistic, descriptive and heuristic” (Merriam, 2009; p. 43) with potential to address, through expansive learning, the “what, why and how” exploratory questions relating to observed or experienced phenomenon (Yin, 2008, p. 2).

Further, Yin (*ibid.*) particularises the importance of the connection between *context* and *phenomenon* when he defines case study as “an empirical enquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident” (p. 18). Power is a phenomenon that exists and takes effect in a variety of ways in clergy leadership practices but is not interrogated enough (Gangel, 1974). Using Yin’s understanding of case study methodology, I did an in-depth investigation of the facilitation of learning about clergy leadership in ACSA, enquiring, among other issues, how power is understood and executed in clergy leadership practices (see Chapter Eight). The findings prompted expansive learning or what Toma (2011) calls collaborative practical action, as explained in Section 3.2.1 and discussed in Section 3.4.2.2.

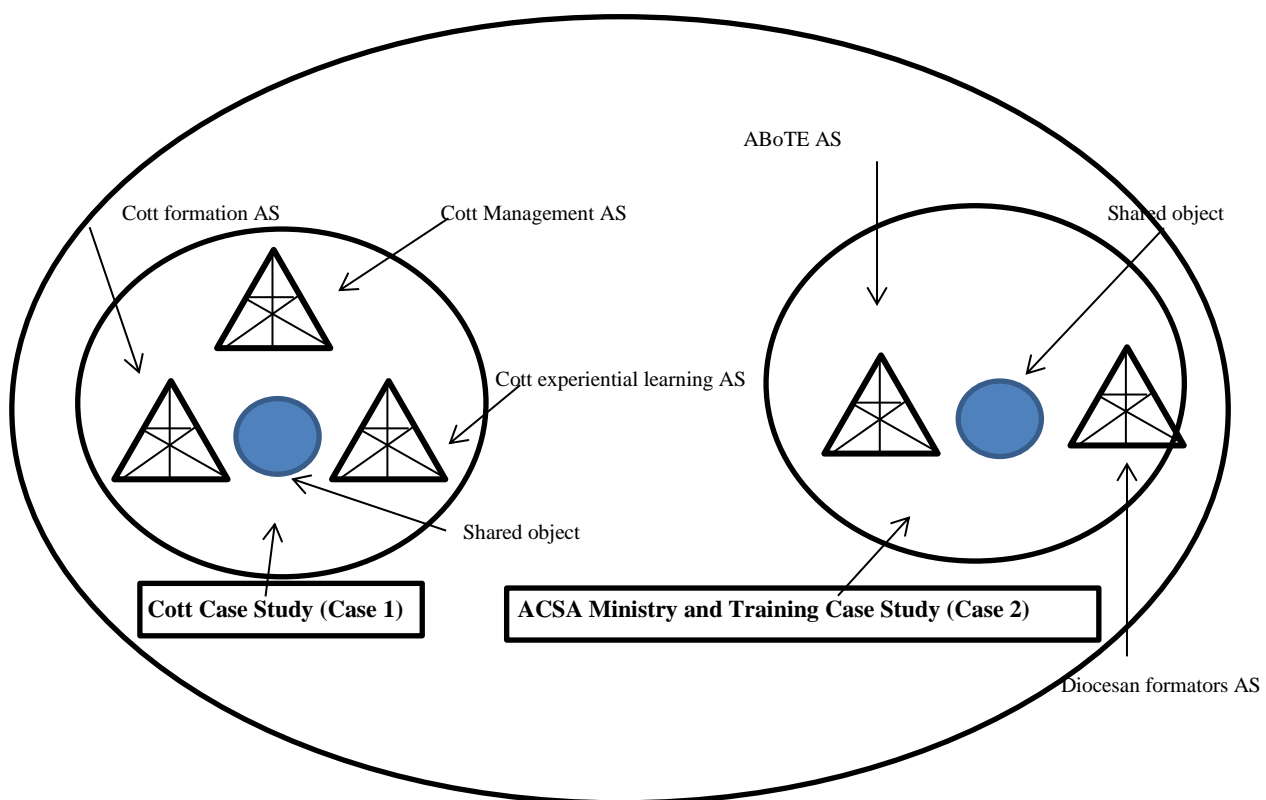
On another key aspect about case study methodology in relation to the CHAT framework, Stake cited in Merriam (2009, p. 14) differentiates “entity”, what Creswell and Clark (2007, p. 73) also call a “bounded system” (unit of analysis in CHAT), and “function”; the former implying real things that can be visualised and the latter, ends of processes, the object in CHAT language (see 2.3). “Entity” would therefore qualify as a case whereas “function” is the purpose of the preoccupation of “entity”. On the basis of this understanding, I was able to

streamline relevant entities (as activity systems) and their functions (objects) in this study (see Figure 3.1).

This research employed a multi-case study method, what Lotz-Sisitka and Raven (2004) also call “nested case studies”, implying cases within a case. Creswell and Clark (2007, p. 73) calls them “multiple bounded systems”. The unique strength of a multi-case study method, which also ensures trustworthiness of research findings, is its ability to collect empirical data using a variety of methods. This study employed interviews, workshops, focus groups, field notes and observation as data collection methods (see 3.3).

### 3.2.3 Multiple case studies with related activity systems

As illustrated in Figure 3.1 below, a minimum of two networked activity systems constituted a case study in this study.

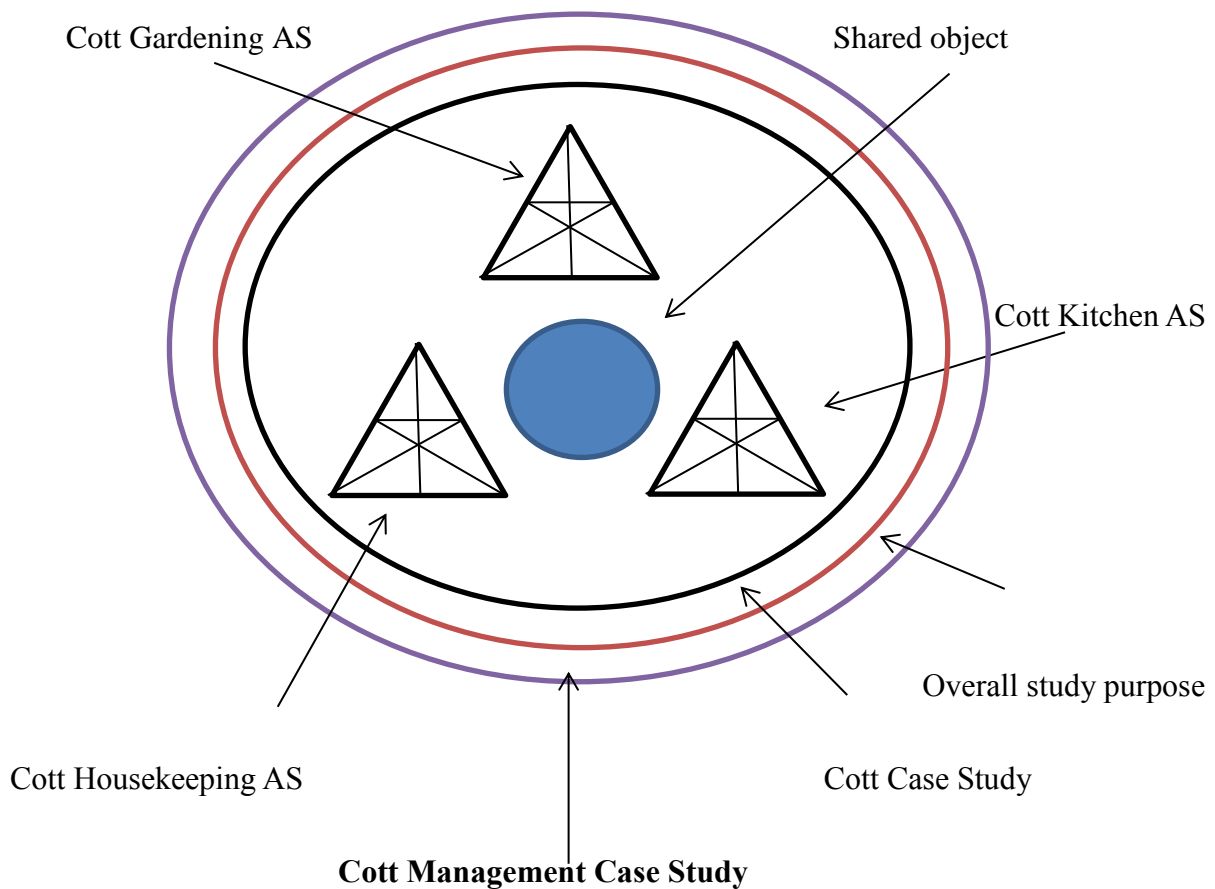


**Figure 3.1: Illustration of networked activity systems (cases) in a case study (refer to 2.3.3.3.2)**

The units of analysis in Case Study 1 are the Cott formation programme; Cott management; and Cott experiential programme, while in Case Study 2 they are ACSA formators (TfM and from Hope Africa); and ABoTE (see 1.2 and 2.3.3.3.2). The small circle between the activity systems in each case study is a shared object which connects the different activity systems in

terms of purpose. The outer oval framing is an indicator that the case studies are related to each other as constituents of a methodology employed in a study that investigated the learning that takes place in clergy leadership formation programmes in ACSA and the collaborative leadership formation practices that can be expanded through learning.

In relation to the discussion under Section 3.3, activity systems allow opportunities to analyse collective action as a unit of analysis which has the potential to expose important information about the activity system such as the dynamic structure of the activity; the historical development of the activity; and the multi-voiced nature of human activity (Engeström, 2001). Further, Miettinen (2009) adds to the discourse the probability that nested case studies with a network of activity systems as illustrated in Figure 3.1, could have their unit of analysis change from one activity system (case) to a network of activity systems (networked cases), making it possible to *follow the object* across organisational boundaries. For instance, in the case of this study, Cott management activity system (as in Figure 3.1) could expand into a network of activity systems as follows:



**Figure 3.2: Illustration of an expanded unit of analysis**

On the basis of this methodological premise, “to avoid rigid, one-dimensional sequences being imposed on social reality” (Engeström, 1991a, p. 10), in Chapter Five, Six, Seven and Eight, I was able to analyse learning across “horizontal and vertical boundaries” (Engeström, 1999a). “Horizontal” implies generating understandings of the phenomenon under study from multiple activity systems involved in the research processes while “vertical” implies the opposite – learning from understandings generated from single activity systems involved in the research processes (see Annexure 4.1).

### **3.3 RESEARCH PROCESS**

#### **3.3.1 Choosing study sites**

Bearing in mind that the purpose of the study was to contribute towards transformation of clergy leadership formation practices in ACSA, I used a case study research design on the understanding that the study sought to *understand* (through investigation of current practices) and *facilitate transformation* of clergy leadership formation practices (expansive learning) “within a real-life context”, ACSA (Yin, 2008, p. 2). As discussed under Section 1.2, ACSA is an Anglican Church denomination in Southern Africa which, among her key priorities as enshrined in her Vision and Mission Statement (see Annexure 3.1), is the commitment to educate and train her clergy in ways that *speak to* the developments happening in the world across the different facets of life. As such, the selection of case studies in this study was principally influenced by what was intended as the outcome of the research (see 1.3; 1.4; 1.5).

In addition, because ACSA is geographically extensive, I had to be strategic in how I selected case studies bearing in mind cost related issues; time constraints; and quality of data to be gathered. On the basis of the advice given by Bloor and Wood (2006) about qualitative research, I used purposive sampling which is also known as theoretical sampling that involved the selection of cases based on my judgement about what would be most helpful. The selection was based on criteria which I designed as below. Selected cases would:

- (a) be located in different geographical locations in ACSA;
- (b) have the potential to involve participants from different parts of ACSA (see 1.2);

(c) have different emphasis on some aspects of clergy leadership formation practices in ACSA, for example, in terms of subject matter (content) or pedagogical approaches and methods;

(d) have a long operational history (at least 10 years), with an invested interest to develop and empower clergy;

(e) have demonstrated potential to model clergy leadership formation practices in ACSA.

The two selected case studies were:

- ACSA Ministry and Training – a composite group of formators from the different dioceses which constitute ACSA and other supporting structures (see 1.2 for a detailed description of the case study).
- Cott – the only residential seminary in ACSA offering a holistic clergy formation programme comprising academic (theological education); spiritual and ministerial formation (also see 1.2 for a detailed description of the case study).

### **3.3.2 Phases of the study**

#### ***3.3.2.1 Phase 1: Exploratory phase***

In response to the main research questions of the study (see 1.5), the “getting on” (Bloor & Wood, 2006) phase of the research required me to:

i) do contextual profiling to identify and examine learning interactions which take place within and between inter-acting activity systems in the facilitation of clergy leadership formation in ACSA;

ii) develop a deeper understanding of the main activity systems which included ABoTE, Diocesan formators, Cott formation, Cott experiential learning and Cott management activity systems (see Figure 3.1) and ascertain how each was approaching the common object of facilitation of clergy leadership formation in ACSA (see 1.2 for details of each of the activity systems);

iii) do an analysis of rules, mediating tools, subject, objects, and division of labour of each activity system.

I geared myself up for the contextual profiling of the study by making the necessary preparations which included reflections about ACSA as a “community of practice” (Wenger, 1998) particularly in relation to the purpose of the study. This was important as it had implications on the methodological strategy that would be employed in the study. Further, I worked on seeking permission from gate-keepers at the organisations which I had chosen to work with; contacting prospective participants; and thinking through, drafting and piloting the questions that I wanted to use in interviews and focus group discussions in this phase of the study. I also thought through the kinds of documents that I would likely be exposed to, whose information would help me respond to the research questions which I was working with. It was also important for me to prepare myself mentally and psychologically as I had embarked on a research journey which, to the best of my knowledge, nobody else has done in ACSA.

I piloted the set questions in Case Study 1 and took notes during the interviews. In my reflections of the first experience, I realised that I would need to audio-tape interviews in future sessions so as to ensure that the details had been captured correctly. I then transcribed each of the interviews done and sent the notes to research participants for corrections. I made follow-ups with individual participants by e-mail after the contact sessions for clarity on some aspects of their responses to the questions asked or what I had observed during the contact sessions with potential value to the purpose of the study.

As mentioned already, the research methods which I employed in this phase of the research included in-depth interviews, document analysis, observation and focus group discussions (see 3.4). This methodological triangulation enhanced the trustworthiness of the data collected (see 3.5). Through these initial interactions, I was able to position myself firmly as an analytical interventionist. Also, this phase of the study gave me the opportunity to develop a systemic view of the selected case studies and their related activity systems (see Figure 3.1). Information collected from the interactions formed part of the mirror data that I used together with relevant theoretical tools in CLWs (see 3.4.4).

### ***3.3.2.2 Expansive learning phase***

On the basis of the mirror data generated in the exploratory phase of the study and the goals (2<sup>nd</sup> & 3<sup>rd</sup>) and main research questions (3<sup>rd</sup> & 4<sup>th</sup>) of the study (refer to 1.4; 1.5), the expansive learning phase aimed at engaging ACSA facilitators (formators) of clergy

leadership formation in an expansive learning process through CLWs (see 3.4.4). This was done with the objective of coming up with a model framework of collaborative facilitation of clergy leadership formation in ACSA that had the potential to address tensions and contradictions currently in existence. Equally important in this engagement was the potential transformation which would happen in the participants themselves as they participated in activities which were intended to transform clergy leadership formation practices (refer to 3.2.1 on DWR). A full discussion and analysis of the CLWs which were facilitated in the study will be done in Chapter Six.

Data collection from the two case studies were organised as tabled below:

**Table 3.1: Two-faced case study design implemented in the study**

<b>PHASE</b>	<b>Cott Case Study</b>	<b>ACSA Ministry and Training Case Study</b>
<b>1</b> <b>Exploratory</b>	<ul style="list-style-type: none"> <li>• Individual interviews</li> <li>• Observations</li> <li>• Document analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Individual interviews</li> <li>• Observations</li> <li>• Document analysis</li> </ul>
	<i>Data generated from the first phase fed into the second phase as 'mirror data'</i>	
<b>2</b> <b>Expansive</b>	<ul style="list-style-type: none"> <li>• Change laboratory workshops</li> <li>• Half-day feedback workshop</li> <li>• Process observation</li> </ul>	<ul style="list-style-type: none"> <li>• Change laboratory workshops</li> <li>• Half-day feedback workshop</li> <li>• Process observation</li> </ul>

### **3.4 RESEARCH METHODS**

A qualitative, multi-method data collection approach was used in this study on the understanding that each research method that was employed disclosed different facets of empirical reality (Maxwell, 2012), thus creating opportunities for an in-depth understanding of the research problem. Creswell and Clark (2007) concur that this method makes possible sufficient explanation of the richness and complexity of human behaviour by studying it from more than one perspective. The multi-method approach also provided opportunities for triangulation which implied the utilisation of the collected data in a comparative manner to determine how the participants had been enabled to develop knowledge and skills in

collaborative practices in the facilitation of clergy leadership formation in ACSA (see Chapter Six, Seven and Eight for an analysis of the data gathered).

I discuss the methods which I employed in this study below.

### 3.4.1 Interview method

According to Paton (2002, pp. 340-341):

We interview people to find out from them those things that we cannot directly observe ...we cannot observe feelings, thoughts and intentions; we cannot observe behaviours that took place at some previous point in time. We cannot observe how people have organised the world and the meanings they attach to what goes on in the world. We have to ask about things. The purpose of interviewing then is to allow us to enter into the other person's perspective.

Paton observes the criticality of what people think about phenomena in the world (ontological subjectivity) in qualitative research such as this study which sought to surface and interrogate underlying mechanisms which have shaped and continue to influence clergy leadership formation practices in ACSA. Without the participants' thoughts and understandings, the research goals would not have been met. Therefore, the interview method contributed immensely to the methodological design of the study.

The process of drafting and executing interview questions cannot be understood as a random exercise; it is a philosophical engagement of its own kind, particularly in relation to the orientation of a given research project (Roulston, 2007) as presented below.

**Table 3.2: Illustration of the philosophy underpinning the process of drafting and executing interviews**

Research orientation	Conceptions of interviewing	Relevance to study
Neo-positivist	Researcher upholds a neutral stance to minimise bias, skilfully asks good questions, generates quality data and produces valid findings.	Applicable in individual and focus group discussions as well as CLWs in concurrence with the expansive learning guidelines (see 2.3.3.3.3).
Phenomenology; Feminist; Psychosocial	The researcher makes no claim to being objective, analysis reveals subjectivities; strives to generate the kind of conversation that is intimate and self-revealing.	Applicable in individual and focus group discussions as well as CLWs in concurrence with the expansive learning guidelines (see 2.3.3.3.3). More pronounced in individual interviews.
Constructivist	Focuses on how interview data is constructed through tools such as discourse analysis; narrative analysis and conversation analysis.	Experienced in focus group discussions and CLWs through conversation analysis (see 3.4.3 and 3.4.4).

Post-modern	Interviewing does not aim to come up with a single perception of self but various non-unitary performances of selves.	Relevant to the study in an interesting way. Individual perceptions about phenomena are valued in the study as the starting point for a critical realist enquiry that seeks to surface underlying causal mechanisms to an experienced phenomenon (refer to 2.2).
Transformative	Issues of power, privilege and oppression are made available.	Most relevant to the research as it is consistent with the theoretical and methodological framework of the study (refer to Chapter Two).
Decolonising	Based on critical philosophical orientation but aims at restorative justice of indigenous people.	Also relevant to the purpose of the study which seeks to transform clergy leadership formation practices in ACSA at both organisational and agential levels.

The interviews done were based on the questions on Appendices 4, 5, 6, 7 and 8.

### ***3.4.1.1 Semi-structured interviews***

According to Merriam (2009), semi-structured interview questions are asked with some degree of flexibility, without any predetermined wording or order, with the objective of obtaining specific information from the respondents which is intended to respond to the expectations of the overall research questions. The method enabled me to obtain relevant information to the study from different participants. Further, as explained by Merriam, the format of the semi-structured interview allowed me to adjust my approach to the subject in question (clergy leadership formation practices in ACSA) with each respondent, particularly paying attention to their worldview (values), experiences in general and specific terms in relation to clergy leadership formation practices in ACSA, and personalities (Paton, 2002). Some of the interview techniques used to ensure both depth and rigour included stating the purpose of the study, asking open-ended questions and cross-checking important issues emerging from the interaction (Kvale, 1996 as cited in Cohen, Manion, & Morrison, 2007).

In addition, the semi-structured interview method creates opportunities for in-depth enquiry on a given subject through intentional probing for deeper insights. In this regard, the method enables the researcher to obtain richer information about the social meaning behind phenomena as perceived by the different respondents (Bloor & Wood, 2006). I was conscious of the interrelatedness of the theoretical and methodological frameworks of the study throughout the research process, for instance, the implicit interconnectedness of CHAT

(particularly the multi-voiced principle of the framework) and the interview method as discussed above.

#### *3.4.1.1.1 Individual interviews*

As discussed above and alluded to in Section 3.3.2.1, I used semi-structured interviews to generate most of the exploratory data. As illustrated in Figure 3.1, there were three activity systems in the Cott case study which are Cott formation (comprising the academic, spiritual and ministerial formation; central activity system); Cott management; and Cott experiential learning which focuses on experiential learning, pastoral attachments and ministerial placements (refer to 1.2). I interviewed a total of six people within the case study in the following manner: three lecturers who are also formators, thus covering the Cott formation programme and Cott experiential programme activity systems; and three personnel in Cott management and administration (refer to 6.4).

Following the advice given by Denzin and Lincoln (2000) sampling of respondents from the three activity systems was purposive and stratified. The three lecturers/formators were a mix of two senior employees (female and male) and a junior employee (male and former student at Cott). One of the senior respondents had the overall responsibility of the Cott formation programme. For the Cott management activity system, the respondents were a male employee (highly qualified in the field of Accounting and Management) and two female employees who had twenty-one years of service at Cott between them. The intention was to ascertain from both sets of respondents what their understandings were concerning the manner in which Cott was facilitating the formation of future clergy leaders in ACSA.

The ACSA Ministry and Training Case Study had two activity systems which are composites of influential activity systems in leadership formation programmes in ACSA as explained in Section 1.2. The two activity systems were ACSA formators and Diocesan formators as illustrated in Figure 3.1. I also interviewed six respondents within the Case Study, three respondents from each activity system. As was the case in the Cott Case Study, the selection of these respondents was purposive and stratified.



***Figure 3.3: Individual interview with Bishop Mark Van Koevering of the Diocese of Niassa (then)***

From ACSA Formators activity system I interviewed two senior male clergy, one a member of ABoTE for six years and the other one a bishop in ACSA for ten years. The other respondent, a female clergy, had been with ACSA for ten years as well. Below are pictures of the individual interviews which I did with the bishop of the Diocese of Niassa, Northern Mozambique. In Chapter Eight I explain why this context was chosen for information gathering in this study.

***3.4.1.1.2 Focus group discussions***

In focus group discussions, participants are given an opportunity to interact with each other with the researcher taking the role of a facilitator and observer, noting the participant views which surface as the discussion unfolds. According to Cohen and Manion (1994), focus groups are contrived settings which bring together a particularly chosen sector of the population to discuss a given subject for the purpose of generating data intended to address, in the case of qualitative research, designed questions. This is an ideal method of collecting data as it allows the researcher to learn more about the participants' "lived world" as they engage in discussions (Berg, 2004).

Focus group discussions in this study were facilitated in relation to CLWs which I discuss in the next section. Between four and eight participants from the different activity systems in each case study, purposively selected (as was done regarding individual interviewees), met before a CLW to discuss their history in relation to clergy leadership formation practices in ACSA. This entailed explaining their understandings of the manner in which the programmes were planned, facilitated and managed; contradictions encountered (in the CHAT sense), if any, and what was being done or not done to address those contradictions. Participants also explained how they were personally involved in the programmes.

The interactions stimulated in-depth discussions which culminated in the identification of a range of contradictions about clergy leadership formation practices in ACSA from the perspective of the different activity systems represented in the group. In some instances, potential solutions to the issues of interest under discussion were deliberated. Stewart and Shamdasani (as cited in Berg 2004, p. 124) describe this agential dynamism as a "synergistic group effect." It allowed the participants to collectively draw from each other as well as

brainstorm ideas on issues relating to the research focus which would require in-depth deliberation towards potential resolutions in CLWs.

Below are pictures of focus group participants from two different parts of ACSA. All participants in the two groups were involved in their respective diocesan clergy leadership formation programmes at different levels. Some of the participants in both groups were also involved in ACSA clergy leadership development programmes. Their contribution to the purpose of this study was invaluable.



*Figure 3.4: Diocese A focus group (Diocesan formators activity system)*



*Figure 3.5: Diocese B focus group (Diocesan formators activity system)*

### **3.4.2 Document analysis**

Documents are perceived as reliable sources of data in case studies for the reason that they carry the history of the phenomenon in question, providers of clergy leadership formation in ACSA in the case of this study. In this discourse, *history* embodies culture and context which are critical concepts in critical realism and CHAT; the ontological and epistemological paradigms employed in this study (see 2.2 and 2.3). Based on this understanding, Yin (2003,

pp. 86-87) asserts that the overall value of documents is in their ability to be stable, unobtrusive, exact and provide broad coverage. Unlike people who would need careful *handling* in order to assist with good research data, documents are *out there* with potential rich data for researchers if accessed (Merriam, 2009). ACSA documents on clergy leadership formation practices which helped me in this research included books, booklets, course programmes and outlines, pictures, brochures, memorandums, annual reports and plans, policies, vision and mission statements, correspondence documents such as letters, circulars, and directives and policies. These documents gave some insight into the participants' understandings of and the institutional position on facilitation of clergy leadership formation, thereby giving clues to the researcher in the investigation to ascertain the historical, cultural and contextual issues that emanate from such understandings (see Chapter Five, Six and Eight). I present below the documents which I analysed for each case study.

**Table 3.3: List of documents analysed in the study<sup>27</sup>**

Case study	Titles of documents analysed
<b>Case Study 1:</b> Cott	<ol style="list-style-type: none"> <li>1. May, J. &amp; Trisk, J. (eds). (2003). <i>The College of the Transfiguration: Centenary Journal</i>. Unpublished.</li> <li>2. <i>From Root to Branch: Colloquium on Theological Education</i> (2013 Year of Theological Education). (Unpublished).</li> <li>3. Cott Vision and Mission Statement (unpublished).</li> <li>4. Cott Teaching and Learning Strategy and Methodologies (Unpublished).</li> <li>5. Cott Student Placement Programmes (Unpublished).</li> <li>6. Cott Diploma in Theology Programme (unpublished).</li> <li>7. Cott Bachelor of Theology Programme (Unpublished).</li> <li>8. Cott Formation Programme (Unpublished).</li> <li>9. Cott Policies (Unpublished).</li> <li>10. Cott Constitution (Unpublished).</li> <li>11. Cott Orientation Brochure (2015). Unpublished).</li> <li>12. Cott Enrolment Form (Unpublished).</li> <li>13. Cott-Hope Africa Leadership Development Programme (Unpublished).</li> <li>15. First Annual College of the Transfiguration Consultation on Theological Education, Training and Ministerial Formation (6 August 2012). (Unpublished).</li> <li>16. College of Transfiguration Strategic Planning (2007). Unpublished).</li> <li>17. Report on Ordinands Body Annual Planning Workshop. (2009). (Unpublished).</li> </ol>
<b>Case Study 2:</b> ACSA Ministry and Training	<ol style="list-style-type: none"> <li>1. Pato, L. L. &amp; Pityana, N. B. (1995). <i>A Trumpet Call: Theological Education and Ministerial Formation in the CPSA</i>. (Unpublished). Issued by The Advisory Board on Theological Education and Training for Ministries.</li> <li>2. Pato, L. L. (2001). <i>Theological Education and Ministry Formation in the C.P.S.A</i>. (Unpublished). Issued by The Advisory Board on Theological Education</li> </ol>

<sup>27</sup> The information generated from the documents accessed was used as *mirror data* in Change Laboratory Workshops done in the 2<sup>nd</sup> phase of the study (see 6.3.4). Appendix 12 illustrates how the documents were analysed.

	<p>and Training for Ministries and The Commission on the Relocation of The College of the Transfiguration.</p> <p>3. 2014 edition of <i>Constitution and Canons of the Anglican Church of Southern Africa</i>. Westhoven: ACSA Publishing Committee. Prepared by the Provincial Registrar and the Secretary of the Publishing Committee of ACSA.</p> <p>4. Linthicum, T., &amp; Chinganga, P. (2013). <i>A Report on Leadership Development in the Anglican Church of Southern Africa</i>. (Unpublished).</p> <p>5. Mbonyana, D. (2014). <i>A Call for Effective Leadership Development in ACSA</i> (Unpublished).</p> <p>6. Leadership Development Workshop notes (eMseni Indaba) – May 2014. (Unpublished).</p> <p>7. Leadership Development Workshop notes (Durban Consultation – October 2014). (Unpublished).</p> <p>8. ACSA – UPSG Memorandum on Leadership Development (2012). (Unpublished).</p> <p>9. Gordon, G. (2002). <i>Understanding Advocacy</i>. Teddington: Tearfund.</p> <p>10. ACSA Vision and Mission Statement. (Unpublished).</p> <p>11. The College of Transfiguration Journal (1994, 1<sup>st</sup> Anniversary Issue). Amalgamation of St. Paul’s and St. Bede’s Colleges. (Unpublished).</p> <p>12. Training for Ministry in ACSA Mind Map (2008). (Unpublished).</p> <p>13. Training for Ministry in ACSA Mind Map (2009). (Unpublished).</p> <p>14. Training for Ministry: A Theology of Ministry Mind Map. (204). (Unpublished).</p> <p>15. Required Minimum Standards for Ordination in the Anglican Church (ACSA). (Unpublished).</p> <p>16. Diocese of Port Elizabeth Training for Ministries Mind Map (2009). (Unpublished).</p> <p>17. Diocese of Saldanha Bay Ordination Process (2012). (Unpublished).</p> <p>18. Diocese of False Bay Formation for Ordained Ministry Programme. (2011). (Unpublished).</p> <p>19. Training for Ministry in ACSA (2009): Post Ordination Training Spiritual Formation. (TfM 2009 Consultation notes). (Unpublished).</p> <p>20. Klaasen, J. (2014). Models of Continuing Ministerial Training and Formation – presentation notes). (Unpublished).</p> <p>21. The Ordained ministry in our Province Today – its character and implications for ministry. (TfM 2011 Consultation notes). (Unpublished).</p> <p>22. Theological Education for the Anglican Church Grids (TEAC Grids). (2006). (Unpublished).</p> <p>23. Moral and Spiritual Leadership for Ministry in a Diversified Context. (TfM 2015 Consultation notes). (Unpublished).</p> <p>24. “The Anglican Church is synodically governed and episcopally led: What are the dynamics and implications of this for the Church in the 21<sup>st</sup> Century? (TfM 2016 Consultation notes). (Unpublished).</p> <p>25. Pityana, B. (2011). The future of theological education in ACSA. Paper presented at TfM Consultation. (Unpublished).</p> <p>26. Wyngaard, P. (2011). Report to the Advisory Board on Theological Education and Ministerial Formation on the Anglican House of Studies. (Unpublished).</p> <p>27. Wyngaard, P. (2011). “Our Church in a changing world: Understanding Ordination within the contemporary diverse Anglicanism in Southern Africa”. Paper presented at TfM Consultation.</p> <p>28. Domeris, W. (2009). Report on ACSA Bishops Questionnaire. (Unpublished).</p>
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### 3.4.3 Participation observation

Observation is a “quick and unobtrusive way of recording aspects of behaviour” as they occur during the research process (Macintyre, 2000, p. 62). This helps the researcher to gain insight

into how the individual(s) participate(s) and interact(s) within the group and what that might mean in relation to the focus of the study.

Elaborating on the above and vital in this study, Merriam (2009) outlines the following questions in connection with observation as a research data collection tool which resonate with the CHAT framework (2<sup>nd</sup> generation as discussed in 2.3.3.2):

**i) Activities and interactions:** What is going on? Is there a definable sequence of activities? How do the people interact with the activity and with one another? How are the people and activities connected? What norms or rules structure the activities and interactions? When did the activity begin? How long does it last?

**ii) Conversation:** What is the content of conversation in this setting? Who speaks to whom? Who listens?

**iii) Subtle factors:** These refer to informal and unplanned activities, symbolic and connotative meanings of words, non-verbal communication such as dress and physical space. What does not happen when something is done differently or is not done?

These scholarly views on the subject provided me with vital guidelines in the eight months that I spent in interaction with the activity systems within the two case studies selected for the study. I indicate in Appendices 8, 9 and 11 how observation processes and considerations were done in the study and the results thereof. In Chapter Five and Six, these processes and considerations are embedded in the reports on how contradictions were surfaced and how CLWs with participants were facilitated. My major impression about the observations done in the whole duration is that one can never prepare oneself enough to observe workshop related activities or day to day workplace related activities. I met with surprises of a different nature at all the workshops that I facilitated in the two case studies. I would prepare myself to focus on particular issues of research interest during the course of a planned workshop only to find out that I had to get down to earth and shift my focus to something totally different but vital in the research process.

For instance, my first workshop with an activity system within Case Study 2 almost failed to meet the intended objectives as a result of an argument which had arisen between two members of the group who happened to have acute differences on a critical matter that had been raised

for deliberation in the plenary phase of the workshop session (see 5.2). This happened despite the fact that I had asked at the beginning for forbearance from participants in relation to differences of opinion during the course of the workshop. In response, I did what I had not planned to do which was to adjourn the workshop and take time with the two participants to seek common ground and understanding on the matter so as to allow the workshop to continue. It turned out that the two participants had, for a long time, held differences on the matter and, given an opportunity, would take on each other on the subject with enthusiasm. On this occasion, a *peace deal* was struck, at least for the duration of the workshop.

Concerning Case Study 1, I took opportunities to engage organisational members in expansive learning activities as determined by the flow of events in the organisation (Cott). Two issues relevant to the study were change of organisational leadership and accreditation of institutional academic qualification programmes. A new Rector had been appointed a year after the study started. This entailed re-negotiating how the study would be conducted in the organisation (refer to 6.4). Regarding accreditation, Cott at this point in time was in the process of finalising proceedings for full recognition by the Department of Higher Education and Training (DoHET) as a Private Higher Education Institution (PHEI), providing accredited courses in Theology which are registered by South African Qualifications Authority (SAQA).

This organisational status quo provided an exciting and beneficial environment for me and the organisation as participants were enthusiastic and fully committed to engaging on issues relating to clergy leadership formation programmes in ACSA, particularly the role played by Cott on the subject matter. As such, expansive learning activities organised were an added opportunity for participants to brainstorm and reflect on what Cott was doing; what needed to be done in alignment with clergy leadership formation needs in ACSA and the operational requirements of DoHET; and the strategies and methodologies that needed to be put in place to ensure that the identified objectives and goals were met (following the format of the expansive learning cycle as discussed in 2.3.3.3.3). The challenge for me was to organise contextually stimulating and affirming expansive learning activities around the subject matter in its holistic nature given the unfolding events in the organisation as explained above (see 5.4; 6.4).

The two case studies provided me with different dynamics regarding clergy leadership formation in ACSA. As such, it required of me to be alert to what was happening on every step of the research process and how I ought to have responded in terms of decision making and

involvement where required (refer to 3.6 – ethical considerations). Besides that, I needed to ensure that I had the necessary research tools at every workshop which included a digital audio recorder and camera; spare batteries; and a note book. I used the digital audio recorder only where it was necessary and did note-writing mostly to avoid the onerous task of transcribing data even for instances when a note or two could have been done during the course of the workshop.

Above all, good rapport with the participants was of absolute importance in both case studies. There were instances when I felt that I had been allowed to facilitate workshops for the reason that I had developed good relationships with the gate-keepers involved more than anything else. In addition to time slots, I also received the generosity of other forms of resources from the activity systems involved in the workshops which included flip chart material, a data projector, Koki pens and refreshments.

#### **3.4.4 Change Laboratory Workshops (boundary crossing laboratories)**

As alluded to in Section 3.2.1, change laboratories are tools for transforming institutional work practices used by researchers within the DWR framework (Engeström, 2007; Sannino, 2008). According to Daniels (2008), the approach works on the basis of the Vygotskian method of “double stimulation” (see Figure 7.2). A key methodological feature of the change laboratory method is that it is participative, following the cycles of expansive learning as discussed in Section 2.3.3.3.

The objective of the exercise is to engage practitioners concerned (facilitators of clergy leadership formation in the case of this study) in reflective cycles of “deconstruction”, “reconstruction”, “trial and readjustment”; thus, exposing the possibilities for transformation of a given activity with joint effort on constructing the zone of proximal development (see Chapter Six and Seven) of the activity (Engeström, 1998, p. 121). In this regard, the approach emphasises that educational and work practices can develop through collective, cognitive and material reconceptualisation of the object of the activity (Sannino, 2008).

Thus Warmington et al. (2005), concurring with Engeström and Sannino (2010), emphasised that expansive learning (through CLWs) ignites change in organisational practices in two particular ways, namely, holistic development of individual organisational members and construction of a new object for the collective activity which implies enhanced organisational

practices. In the case of this study, facilitators of clergy leadership formation programmes and processes in ACSA would be equipped with requisite knowledge and skills which would enable them to transform the prevailing understandings of their practice (object), thereby contributing towards transforming current processes and activities in line with the envisioned outcome of their engagements (refer to 5.2).

Further, Warmington et al. (2005, p. 89) argued that the following elements are ingrained in CLWs which have implications on agential expansive learning and transformation of organisational practices:

- facilitation of practitioners' "reflective systemic analysis" as a means of engendering and promoting change in professional thinking, practices and organisational cultures;
- promotion of systemic change in organisational practices by focusing systemic analysis upon (a) collective learning challenges facing practitioners and organisations in the drive towards multiagency working (b) the surfacing of contradictions in past and present practice that might point towards new forms of professional practice (future objects); and
- production of strong conceptual resources for practitioners to use when engaging in the new practices demanded by changes in structural tools such as policies (using the workshop sequence to confront professionals' "everyday concepts" with "scientific concepts" derived from activity theory analysis, thereby generating a process of remediation, the creation of tools appropriate to emergent forms of practice) (see Table 6.1).

In acknowledgement of the relevance of these theoretical guidelines to the study, it was necessary to encourage reflexivity in participants as facilitators of clergy leadership formation programmes in ACSA (see 7.3). Delanty (2005, p. 120) asserted that doing so helps to create spaces for "self-transformative capacity involving the use of knowledge to generate further knowledge" by focusing on the relational encounter of subjectivity with objectivity. In relation to this postulation, Edwards (2007) adds that the dialectical relationship between the subject and the object is paradoxical in the sense that, as a result of the subjects working on the object, the latter, in return, works back on the subjectivity of the subjects and their approach to the object. In the case of this study, as facilitators of clergy leadership formation programmes in ACSA worked towards developing transforming and collaborative models for their practices (object), their agency was enhanced through

collective “reflexive systemic analysis” (Warmington et al., 2005, p. 11) of contradictions surfaced within and between the case studies involved in the study.

Engeström (2004) suggested key elements of the DWR approach which I used as a frame of reference in the process of designing workshops, complemented by the models of intervention suggested by Moldashl and Brödner (2002), in Pihlaja, (2005, p. 190) as below:

**Table 3.4: Complementary relationship between Engeström’s (2004) key elements of the DWR process and the intervention models (as suggested by Moldashl & Brödner as cited in Pihlaja, 2005)**

Models of intervention (as suggested by Moldashl & Brödner as cited in Pihlaja (2005).	Engeström’s (2004) suggested key elements of the DWR approach.	Application to study.
<p><b><u>Expertocratic model:</u></b></p> <p>The model assumes that scientific knowledge is superior to practitioner’s knowledge.</p>	<p>Employing activity theory as the analytical framework shared by researchers and practitioners as informed by Vygotsky’s socio-cultural historical method of analysis of the formation of conceptual and material tools in use;</p> <p>Producing strong conceptual resources for practitioners to use when engaging in new practices demanded by changes in policy (using the workshop sequence to confront professionals’ <i>everyday</i> concepts of practice with <i>scientific</i> concepts derived from activity theory analysis, thereby generating a process of remediation and the creation of tools appropriate to emergent forms of practice).</p>	<p>Introducing to participants some of the theoretical and methodological tools and frameworks employed in the study which include:</p> <ul style="list-style-type: none"> <li>• the CHAT framework</li> <li>• Expansive learning cycle</li> <li>• DWR approach</li> <li>• Clergy leadership formation related concepts which articulate mirror data which emerged from the interactions in the exploratory phase of the study (refer to Chapter Seven &amp; Eight for in-depth analysis).</li> </ul>
<p><b><u>Proceduralistic model:</u></b></p> <p>The model assumes that knowledge is already available in the organisation and only needs to be mobilised.</p>	<p>Promoting systemic change by focusing systemic analysis upon (i) collective learning challenges facing practitioners and organisations in their drive towards multiagency working; (ii) the surfacing of contradictions in past and present practice that might point towards new forms of professional practice (future objects).</p>	<p>Wals, van den Hoeven and Blanken (2007, p. 79) call this model “deframing” – which relates to how participants articulate and challenge each other, revealing conflicting understandings of the phenomenon in question, clergy leadership formation practises in the case of this study. In relation to the methodology employed in the study, this is the process of sharing views and ideas in focus group discussions which culminates in the exercise of surfacing and analysing contradictions in CLWs following the cycle of expansive learning (see 2.3.3.3.3).</p>

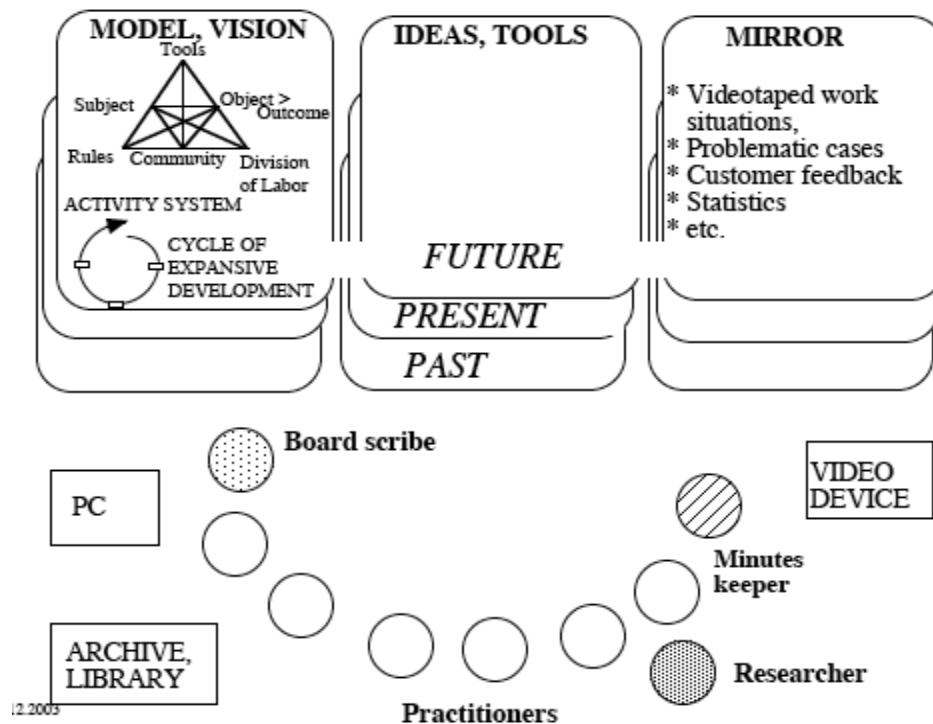
<p><b><u>Reflexive model:</u></b></p> <p>The model transcends the first two models and stimulates re-negotiation and self-reflection among both organisational members and external experts.</p>	<p>Facilitating practitioners’ reflective systemic analysis as a vehicle for examining and promoting change in professional thinking, practices and organisational cultures</p>	<p>Wals et al. (2007, p. 79) call this model “reframing”, following “deframing” and is concerned with the co-creation and joint reconstruction of ideas, which connects with the solution modelling in CLWs as guided by the expansive cycle (see 2.3.3.3.3).</p>
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#### ***3.4.4.1 Structure and administration of Change Laboratories***

As indicated in Table 3.4 above, I initiated cycles of CLWs with representatives of the selected activity systems for the study. I relied on “three sets of surfaces” (Sannino, 2008, p. 237) to represent the work activity as illustrated in Figure 3.6.

The diagram is a depiction of an ideal layout of the workshop and the dynamics through which researchers and practitioners share the same conceptual tools in the process of analysing, repositioning and redesigning practice (*ibid.*). The details of the “three sets of surfaces” are as below:

***Mirror surface:*** the point of departure in change laboratory work is sharing with practitioners’ examples or illustrations of their practices obtained from the exploratory phase. This study employed individual interviews, focus group discussions, and document analysis as explained in previous sections. The data obtained was used as mirror data, mirroring in particular current organisational problems, situations and disturbances, as well as novel solutions on the subject of clergy formation processes and activities (Daniels, 2008).



**Figure 3.6:** Prototypical layout of the Change Laboratory (University of Helsinki (CRADLE) webpage)

**Model and Vision:** This *surface* is reserved for theoretical tools and conceptual analysis which are used to elaborate conceptual models of the activity under scrutiny with the objective of interrogating systemic contradictions. In Table 3.5 I explained how this process unfolded in the CLWs which were facilitated in this study. Therefore, the model and vision *surface* provide an opportunity for “dual stimulation”, a process where participants collectively face and workout contradictions of their own practice (Sannino, 2008). Throughout the expansive learning phase, it was important for me to keep in mind the five principles of activity theory as these had theoretical and methodological implications in the manner in which the CLWs were unfolding (refer to 2.3.2).

**Ideas and tools:** is the third *surface* used in CLWs as an intermediate *empty* stage between the “experiential mirror” and the “theoretically structured model” and allows for capturing of ideas and representations in progress (Sannino, 2008, p. 237).

In view of the above and as discussed in Chapter Five and Six, CLWs with activity systems within the two case studies were organised as shown below:

**Table 3.5: Illustration of the layout of CLWs facilitated in the study**

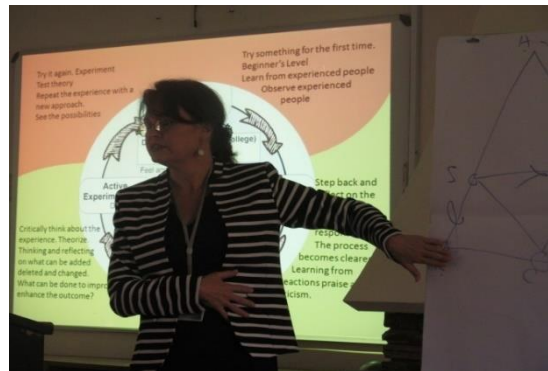
SESSION	FOCUS OF SESSION	FACILITATION PROCEDURES, APPROACHES AND METHODOLOGIES
<p><b>One</b></p> <p><b>(Full day)</b></p>	<ul style="list-style-type: none"> <li>• Orientation to the workshop</li> <li>• Orientation to some of the theoretical and methodological tools used in the study relevant to the facilitated CLWs.</li> <li>• Overview of the clergy leadership formation historical trends in CPSA (ACSA) with relevant examples from the organisation/s represented.</li> </ul> <p>(See Chapter Six)</p>	<p><b>Introduction</b> – Explanation of the subject and scope of the research project; the motivation for embarking on this type of research in the context of the church, ACSA in particular; the reason(s) for selecting the case studies in which the CLWs were being conducted.</p> <p><b>PowerPoint presentation</b> - based on selected theoretical and methodological tools employed in the study and relevant to the CLWs being conducted (see Figure 3.7).</p> <p><b>Group work</b> - Participants were purposively allocated to groups to work on allocated tasks (see 6.3.3.1).</p> <p><b>Plenary session</b> - Feedback from participants and open discussion where necessary.</p> <p><b>Conclusion</b> – Re-capping key issues covered in the session and explaining how those issues formed the basis of the next session.</p>
<p><b>Two</b></p> <p><b>(5hrs)</b></p>	<ul style="list-style-type: none"> <li>• Participant identification of a common <i>object</i>; contradictions and tensions,</li> <li>• Presentation of mirror data by researcher.</li> <li>• Analysis of contradictions and tensions towards surfacing contradictions.</li> </ul> <p>(See Chapter Five and Six)</p>	<p><b>Introduction</b> – Through the use of probing questions, the researcher ascertained what and how much participants had understood and still remembered about the thrust of the workshop. Notes were jotted on flipchart for purposes of future referencing and cross-checking. A common <i>object</i> in the deliberations was agreed to.</p> <p><b>Group work</b> – Participants were purposively allocated to groups to work on identifying contradictions and tensions evidenced in clergy leadership formation practices in ACSA basing on what had been discussed in the workshop to this point in time.</p> <p><b>Feedback from groups</b> – Groups shared their thoughts which were noted on flip chart.</p> <p><b>Presentation of mirror data</b> – Researcher then presented mirror data which affirmed some of the contradictions and tensions which had already been deliberated and also bringing to the attention of the participants additional contradictions and tensions evidenced in ACSA leadership formation practices.</p> <p><b>Plenary session</b> – In preparation for the next session, researcher challenged participants to select, synthesise and possibly rank the contradictions and tensions which they felt and agreed as a group were relevant to improving leadership formation practices in ACSA, particularly within the activity systems represented. These were noted on flip chart for reference purposes at the next session.</p> <p><b>Conclusion</b> – Participants were asked to do personal reflections on what had been covered in the process to this point in time for sharing with the group at the beginning of the next session.</p>
<p><b>Three</b></p>	<ul style="list-style-type: none"> <li>• Reconceptualising common object;</li> <li>• developing model solutions and critiquing them.</li> </ul>	<p><b>Analysis:</b> Researcher facilitated an analysis of the selected contradictions and tensions by the participants in terms of history, causes/evolution and effects. Key points were written on flip chart with space reserved for model solutions against each selected and analysed contradiction or tension.</p> <p><b>Development of model solutions</b> - After a 30-minute refreshment break, the session continued with participants working in purposively allocated groups on model solutions</p>

<p>(5 hours)</p>	<p>(See Chapter Six)</p> <ul style="list-style-type: none"> <li>Way forward.</li> </ul> <p>(See Chapter Six)</p>	<p>for tasked contradictions or tensions. These were slotted into the reserved spaces on the flip chart with selected contradictions or tensions. The information was displayed on the wall where everybody in the room could read.</p> <p><b>Plenary session</b> – Researcher led the session whose focus was to critique the adequacy of each suggested solution. In addition, the internal coherence of the suggested solutions was also critiqued. Key points were written on flip chart. In essence, this session acted as the initial test of the model solutions.</p> <p><b>Conclusion</b> - Researcher reminded the participants about the scope of the research and the role that they were to shoulder in taking the research programme further – which was the application of the suggested and critiqued model solutions.</p> <ul style="list-style-type: none"> <li>Communication lines were opened for further deliberations on the suggested model solutions between the researcher and the participants beyond the CLWs (scope of the research programme).</li> <li>Researcher thanked the participants for their willingness and enthusiasm to participate in the research project, wishing them well in the application phase.</li> </ul>
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As discussed in Section 2.3.3.3.3, session one would be categorised under the context of criticism while sessions two and three would fall under the context of discovery. The context of application was beyond the scope of the study. Below are pictures of CLWs which I did with two activity systems which constituted case studies selected for this study (refer to Figure 3.1 and Chapter Five and Six for details).



**Figure 3.7: CLW with some of the ACSA Ministry and Training case study participants**



*Figure 3.8: CLW with some of the Cott case study participants*

### **3.5 ENSURING DATA QUALITY (VALIDITY)**

According to Toma (2011), trustworthiness in qualitative research relates to standards of data validity, reliability, generalisability and objectivity. Maxwell (2005, p. 106) elaborates that validity should be understood as the “correctness or credibility of a description, conclusion, explanation, interpretation or any other sort of an account.” Smith (1991) as cited in Kumar, 1996, p. 137), concurs that “validity is the degree to which the researcher has measured what (one) has set out to measure” while Brinberg and McGrath (1985) as cited in Maxwell (1993, p. 13), caution that “validity is not a commodity that can be bought. Rather, validity (should be understood) as integrity, character, and quality, to be assessed relative to purposes and circumstances”. Validity, therefore, “relates broadly to the extent to which an instrument measures what it claims to measure, or tests what it is intended to test” (Wilkinson, 2000, p. 38). What this suggests is that research data should be credible (in preference to internal validity); transferable (in preference to external validity); dependable (in preference to reliability); and conformability (in preference to objectivity) (Lincoln & Guba as cited in Toma, 2011). I address these four dynamics below in relation to the data obtained in this study.

#### **3.5.1 Data credibility**

According to Toma (2011), credibility in qualitative research is realised if the participants agree with the constructions and interpretations of the researcher. This locates the participants at the heart of the data gathering process in a study such as this, where I, as the researcher, needed to always ask myself questions such as the following in order to ensure credibility: how congruent are the findings with reality? Do the findings capture what is really there? Are investigators measuring what they think they are measuring? (Merriam, 2009).

Following the advice given by Fielding and Fielding (1986), triangulation ensured trustworthiness of the research findings through the use of different data generating methods which included individual interviews, document analysis, participant observation and focus group discussions in CLWs. Central to the triangulation process is the comparison of data generated through different methods. For instance, within Case Study 2, I interviewed individuals from different contexts in ACSA on their understandings and experiences of

leadership formation practices and what they thought needed to be done to improve the *status quo* (refer to 3.3.1). The same investigation was done with focus groups in CLWs. The views from the different sources of information were cross-checked with information generated from documents and participant observations. The analysed and synthesised data was presented to participants in CLWs as mirror data for further deliberation (see 3.4.4.1).

Along with data triangulation, I also did theoretical triangulation whereby I used multiple theories relevant to the study (see Chapter Two) to decipher emerging themes from the findings which would become the focus of attention in Chapter Seven and Eight.

Member checking is another method which I used to ensure data validation in both phases of the research as advised by Merriam (2001). In the words of Maxwell (2005, p. 111), “this is the single most important way of ruling out the possibility of misinterpreting the meaning of what participants say and do and the perspective they have on what is going on, as well as being an important way of identifying your own (researcher) biases and understanding of what you observed”. I used face to face semi or formal interviews, e-mail correspondence and phone calls to follow-up on participants to confirm the information which they had given me during the data collection process. The eight months that I was in close interaction with the participants provided me with sufficient time to make these follow-ups.

As alluded to by Maxwell (2005) above, the integrity of the researcher is a critical matter in the quest to ensure credibility in qualitative research. This demands of the researcher, “the human as instrument”, to critically reflect on the self and deal with any biases, dispositions and assumptions with the potential to interfere with the credibility of the research process, particularly in relation to receiving and handling of data from participants (Merriam, 2009, p. 219).

Considering that I was using critical realism and CHAT, research paradigms with emancipatory emphasises, I could not claim neutrality in my handling of the research findings. However, as advised by Maxwell (2005), I had to declare my personal values and beliefs that I was bringing to the study to avoid suspicions of bias in the manner that I managed and interpreted data (see Chapter One).

Departmental PhD seminars and critical feedback from my supervisor also played a huge role in assisting me to ensure that my research data was credible. I also asked a colleague in the

department to give a third opinion on my work which helped to complement supervisory feedback. Colleagues who were teaching development courses such as Theology and Development in universities also assisted me with ideas on my work, particularly on the tasks of data handling and interpretation. Regarding this research practice, Bozaleck and Matthews (2009, p. 27) explain that the purpose is “to critique another’s experience by providing data and asking critical and provocative questions of each other’s work, and by using each other’s feedback to provide different lenses with which to view reality”.

### **3.5.2 Data transferability**

Transferability as a data validity measure concerns the extent to which the research findings of one study can be applied to other situations. Even though the onus to ensure that selected data is relevant to a research project lies less with the original investigator than with the person seeking to use the data elsewhere, the latter needs to provide adequate descriptive data to make transferability possible (Lincoln & Guba, 1985). I addressed this expectation by using the theoretical and methodological frameworks chosen for this study in a manner that would assist the reader to understand the phenomenon under study (heuristic method) which is the preoccupation in Chapter Five, Six, Seven and Eight.

### **3.5.3 Data dependability**

In qualitative research, data dependability concerns ensuring research rigour and trustworthiness. According to Toma (2011), this requires of the researcher to pay attention to the following research attributes: (a) a study design that aligns with research questions (see 3.2); (b) findings showing parallelism across data sources (as shown in Chapter Six, Seven and Eight); specifying basic theoretical constructs and analytical frameworks (see Chapter Two); collecting data across a full range of settings (see 3.4); and (c) peer reviewing, as discussed above.

### **3.5.4 Data conformability**

According to Shenton (2004), data conformability demands of the researcher to ensure as far as possible that the research findings are a result of the experiences and ideas of participants rather than the characteristics and preferences of the researcher. To meet this expectation, I used triangulation, as explained above, to minimise the influence of my biases as a researcher which I declared from the outset in the study (see Chapter One). Also explained above, I

employed the member checking method as a mechanism to validate the data which I was working with to ensure conformability.

### **3.6 ETHICAL CONSIDERATIONS**

According to Creswell (2007, p. 73), working with participants in “bounded systems” has ethical implications hence the need for social scientists to seek permission to interact with potential research participants. The participants in this study were ordained priests and other personnel who were involved in clergy leadership formation programmes in ACSA. I am also a priest and was a lecturer at Cott for the duration of the research process. Though some of the participants were from the same College (Cott), I was in no way senior to them. Hence issues of power and authority did not arise.

Nevertheless, the fact that the majority of the participants were colleagues called for special care to be taken in data gathering and interpretation. Taking heed of the advice given by Adler and Adler (1987), I was well aware that as an insider researcher, I was faced with the critical question: “when qualitative researchers are members of the population they are studying, how reliable are their findings?” (Dwyer & Buckle, 2009, p. 54). Such an enquiry is imbued with ontological and epistemological questions. At the core is the attempt to establish whether it is possible, as an insider-researcher, to suspend one's biases during the research process, what phenomenologists call *epoché* (bracketing). While it is impossible to suspend *who you are*, the answer lies in how one works with qualitative data. As presented in Section 3.5, the data that I gathered was both rich and personal, making it imperative for me to honour the data rather than my prejudices. My supervisor and critical friends as mentioned in Section 3.5, also assisted with checking the validity of my interpretations.

As the research was of an interactive nature between the participants and me, there was need to consider certain ethical issues that might arise which could affect the overall outcome of the study. As Schwandt (1997, p. 4) clarifies, “the ethics of qualitative inquiry are concerned with the ethical principles and obligations governing conduct in the field and writing up accounts of fieldwork”.

All participants were informed about the nature and expectations of the study in order for them to get a clear indication of what the research study was all about, who would be involved and the means by which the data would be collected (Maxwell, 2005). The participants were made aware of risks they could have been exposed to due to the processing

and dissemination of the data (*ibid.*). Further, the participants were informed of their right to privacy and confidentiality, and of the role that each one would play and how the data would be collected. In order to avoid any form of harm to the respondents, they were made aware that they could withdraw from any of the research interactions at any stage during the research process.

According to Maxwell (*ibid.*), it is deemed to be unethical if information is collected without the knowledge of the participant, their informed willingness, and expressed consent. Kumar (1996, p. 192) states that informed consent “implies that subjects are adequately aware of the type of information you want from them, why the information is being sought, what purpose it will be put to, how they are expected to participate in the study, and how it will directly or indirectly affect them”.

Participant consent was voluntary; no pressure was placed on the participants to get involved in the process. All participants were asked to complete and return a consent form which laid out the aims and expectations of the research study. Since this study was conducted in ACSA, it was necessary to inform the Bishop responsible for provincial clergy leadership formation programmes and the Rector of Cott of the aims and expectations of the research in order to obtain letters of consent, which were granted.

In order to address the sensitivity which often characterises research, I ensured confidentiality with all the participants in order for them to “act and reply [as honestly as possible] so that a true picture of an event could be obtained” (Macintyre, 2000, p. 47), without them feeling threatened or being intimidated. At the beginning of each interview the issue of confidentiality and anonymity was shared with the participants to ensure that they understood that their names would be changed so that no-one would identify where and who the data came from.

### **3.7 DATA ANALYSIS**

According to Merriam (2009), data analysis entails making sense of collected data which involves consolidating, reducing and interpreting what people have said and what the researcher has seen and read. Further, Merriam (2009) elaborates that this is an “emergent” process, implying that the researcher has to endeavour to interpret data as it is collected, thus making data generation and analysis a “recursive and dynamic” process (p. 169). I found

these theoretical guidelines helpful in this study from the onset. However, analysis intensified in-between the two research phases of the study and when all the data had been collected.

In order for me to keep track of the unfolding *story* with a sense of meaning, I found I had to design a discerning strategy from the onset. In the first instance, as advised by Bogdan and Biklen (2007), I routinely drafted analytical questions relating to the research purpose and questions before meeting with participants for interviews or CLWs. These questions did not only assist me with creating purposeful conversations with the respondents but also enabled me to observe phenomena with focused criticality. For instance, in relation to the first research goal: *To investigate learning processes that will enable critical engagement with the current practices in the facilitation of clergy leadership formation in ACSA*, I raised questions in a document I called the *Clergy Leadership formation practices in ACSA checklist*.

It was also important for me to engage the respondents at every possible opportunity on the concept *leadership* as understood in the context of the church, particularly in ACSA, and in their personal practices. As such, I designed questions for this purpose with the guidance of theoretical perspectives on the concept which I had read and regurgitated from within the framework of the purpose and goals of the study. In the same breath, this exercise challenged me to continue reflecting on the theoretical framework of the study vis-à-vis the unfolding research *story* (see Table 3.5), thus enabling me to add vigour to the data analysis process.

Further, Bogdan and Biklen (2007) advise that every planned encounter with participants should be preceded with reflections on findings from previous encounters with the same participants or others involved in the research process. This is done with the objective of developing a sense of the key issues emerging in the research process and probable areas or aspects of the interactions still requiring clarity or further probing. I particularly found this advice empowering in my engagements with respondents from different dioceses within the ACSA Ministry and Training case study who often raised conflicting understandings of clergy leadership practices in ACSA as presented in Chapter Five and deliberated with in-depth analysis in Chapter Six, Seven and Eight.

The data analysis process started with coding and categorising data collected, a process which, according to Marshall and Rossman (2006, p. 209) creates “buckets or baskets into which segments of text are placed”. The interviews for the Cott case study were coded **C** and those for the ACSA Ministry and Training case study were coded **A**. As an example, the first

interview for Cott was **Cint1** while **Cfg1** represented focus group 1(one) for the same case study. I then analysed each interview in each case study which led me to the exercise of synthesising the emerging issues, first at case study level and then across the two case studies as shown in Annexure 4.1. An in-depth analysis of the emerging issues from the two case studies was done in Chapter Five and Six. At this level, the analysis was mainly inductive, that is analysis that lets data speak for itself (Danermark et al., 2002).

The next level in the process of data analysis was abductive which is undergirded by theoretical lenses (see Chapter Two) to make sense of the research data; a movement from the concrete to the abstract (Danermark et al., 2002). In particular, I drew on the second and third generations of activity systems to provide me with lenses through which I was enlightened on the nature and dynamics of clergy leadership formation practices in ACSA. I used critical realist layers of reality as an *under-labourer* in the process of deciphering meaning from the phenomena. I also used a social theorist critique of educational leadership as emerging in the field of Educational Leadership and Management to interrogate the concept leadership as understood and practiced in ACSA (see 2.4; Chapter Seven and Eight).

In CLWs I guided participants in analysing the historical and empirical contradictions and limitations in their understandings and practices of clergy leadership on the basis of the CHAT and expansive learning frameworks. In response to the expectations of the first and second goals of the study (see 1.4), I discerned learning gaps and challenges in current ACSA clergy leadership formation practices and shared the information with the participants during feedback sessions. The intention of this exercise was to enhance the agency of the participants with “[some] of the several possible interpretations” (Danermark et al., 2002, p. 95) of the object of their practices and, in relation to qualitative research requirements, to validate both data collection and analysis (see 3.5) through participant feedback and on-going engagements on the subject.

In the next level of data analysis, responding to the second research goal: *To surface and critically interrogate underlying causal mechanisms that have shaped and continue to influence facilitation practices in leadership formation in ACSA*, I did retroductive analysis (see Chapter Seven and Eight), the quest being to decipher explanatory principles and causal mechanisms in relation to clergy leadership formation practices in ACSA.

The essence of data analysis in qualitative research is concisely captured by Danermark et al. (2002, p. 200) when they advise that:

In order to understand and explain the social world, as scientists we try to understand and explain what meaning actions and events have to people, but we also endeavour to produce concepts, which make it possible to transcend common sense and attain a deeper understanding and explanation of a more abstract character. This is called the double hermeneutic of social science.

Table 3.6 below shows the analysis which was done in the study which illustrates double hermeneutics as postulated by Danermark et al. (2002).

**Table 3.6: Summary of data analysis processes**

Type of analysis	Mode of inference	Research question addressed
Interview analysis	<ul style="list-style-type: none"> <li>• Inductive analysis.</li> <li>• Initial categories from interviews and observations.</li> </ul>	<ul style="list-style-type: none"> <li>• What learning in facilitation of clergy leadership formation takes place among different participants in ACSA? <b>(Chapter Five).</b></li> </ul>
<ul style="list-style-type: none"> <li>• Analysis of emerging clergy leadership formation models in ACSA as discussed in Chapter 4, surfacing contradictions and tensions.</li> <li>• Activity system analysis in each Case Study and across Case Studies, surfacing contradictions and tensions.</li> </ul>	<ul style="list-style-type: none"> <li>• Inductive analysis to establish themes.</li> <li>• Abductive analysis using 2<sup>nd</sup> generation CHAT; theories on Christian formation – critical reading of Groome (1991);</li> <li>• Critical reading of Engeström, (1987; 2001) – “transformation of practice as a form of expansive concept formation”.</li> <li>• Historical analysis.</li> </ul>	<p><b><u>Main question:</u></b> <i>What learning</i> in facilitation of clergy leadership formation takes place among different stakeholder groups in ACSA?</p> <p><b><u>Sub-question:</u></b> <i>What types of learning interactions</i> occur amongst the key facilitators of clergy leadership formation in ACSA? <b>(Chapter Five).</b></p>
<ul style="list-style-type: none"> <li>• Analysis of contradictions and tensions in clergy leadership formation practices in ACSA.</li> </ul>	<ul style="list-style-type: none"> <li>• Abductive analysis using CHAT 2<sup>nd</sup> and 3<sup>rd</sup> generations;</li> <li>• Critical realist causal mechanisms;</li> <li>• Retroductive analysis to establish what must have caused the contradictions.</li> </ul>	<p><b><u>Main question:</u></b> What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context? <b>(Chapter Six).</b></p>
<ul style="list-style-type: none"> <li>• Analysis of CLW processes.</li> <li>• Micro-analysis of learning processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Abductive analysis using CHAT 2<sup>nd</sup> and 3<sup>rd</sup> generation (Boundary crossing; expansive learning; Vygotskian theory: Zone of Proximal Development; scaffolding); critical reading of Sannino, 2008; Mezirow, 2000; Archer, 2003 (reflexivity).</li> </ul>	<ul style="list-style-type: none"> <li>• How can the learning interactions on collaborative facilitation be expanded?</li> <li>• How can such learning be expanded amongst key participants?</li> <li>• What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive learning</li> </ul>

		process interactions? ( <b>Chapter Seven</b> ).
<ul style="list-style-type: none"> <li>• Cross analysis of theory in relation to the emerging issues in the study.</li> </ul>	<ul style="list-style-type: none"> <li>• Abductive and retroductive analyses by discussing the extent to which the conceptual, theoretical and methodological tools employed in the study were applicable in a context of change oriented learning in the subject of clergy leadership formation in the context of the church (ACSA).</li> <li>• Application of a social theorist approach on agency in clergy leadership, focusing particularly on power dynamics in organisational leadership.</li> </ul>	<ul style="list-style-type: none"> <li>• What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive learning process interactions? (<b>Chapter Eight</b>).</li> </ul>
<ul style="list-style-type: none"> <li>• Implications and recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>• Abductive analysis on the basis of the goals of the study for each Case study and what could be done to move towards the desired state.</li> <li>• Retroductive inferences to suggest future trends in clergy leadership formation in the church, ACSA in particular.</li> </ul>	<ul style="list-style-type: none"> <li>• How can the learning interactions on collaborative facilitation be expanded?</li> <li>• What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context? (<b>Chapter Nine</b>).</li> </ul>

### 3.8 CONCLUSION

The chapter discussed how data was generated through the use of the DWR research methodology within a critical research framework. The multi-case study approach used in the study was discussed, giving detailed explanations of the activity systems within each case study. Further, the chapter discussed how, in response to the research questions and goals as presented in Chapter One and the theoretical and methodological guidelines as discussed in Chapter Two, data were gathered and analysed in the two phases of the study. In relation to the engagements in Chapter Five, Six, Seven and Eight, the chapter informs and guides the presentation and analysis of data, as well as the expansive learning process.

The next chapter presents an investigation of the models of clergy leadership formation which have emerged in the history of the church, with a focus on the Anglican Church, ACSA in particular.

## **CHAPTER FOUR: HISTORICAL BASIS OF ACSA CLERGY LEADERSHIP FORMATION MODELS**

*I am a leader by default, only because nature does not allow a vacuum.*  
(Archbishop Emeritus Desmond Tutu).

*Unfortunately, given the financial struggles of dioceses and archdioceses, on-going formation (of clergy) is sometimes the first thing to go. In my view, the best way to kill an organisation is to not develop its people. Leaders do not happen accidentally, and if the formation process is left to chance, major leadership problems will bedevil the organisation in the near future* (Carol Fowler, participant at a National Leadership Roundtable on Clergy Leadership and Management Conference at The Wharton School, 2005, p. 30).

### **4.1 INTRODUCTION**

In relation to the focus and goals of this study as articulated in Section 1.3 and 1.4, the two statements above are of significant interest. Insinuated in Archbishop Emeritus Desmond Tutu's statement could be the question: Under what considerations does one qualify to be made a leader in the Anglican Church of Southern Africa (ACSA)? Contrary to the opinion implied by the Archbishop's statement, ACSA, for which he is an icon, is intentional in her formation of clergy which, in essence, is the conviction encapsulated in Carol Fowler's statement above. Jointly, the two statements above reinforce ACSA's perspective on clergy leadership formation which is articulated in the following statement taken from a Provincial (ACSA) document:

Leadership formation, growth and transformation are dynamic and evolving areas where the church needs to have constant, continuous and methodical engagement and commitment (*ACSA Provincial Leadership Development Programme Document, 2012, p. 2*).

On the basis of the understanding implied above, this chapter investigates the historical foundations of Christian leadership formation processes, with the objective of ascertaining clergy leadership formation models relevant to ACSA (the context of this study) from inception (1848) to date (2017). The chapter discusses how the developments which have happened in the church from its inception have contributed to the emergence of distinct Christian leadership formation models, which form the basis of clergy leadership formation in ACSA. In this discourse, the church is understood as a learning organisation (Gangel, 1974; Gonin as cited in Nelson, 1996; Shawchuck & Heuser, 1996; Dale, 1998; Evans &

Percy, 2000; Jarvis, 2004; refer to Chapter Seven), particularly in relation to the conceptualisation, planning, designing, management and facilitation of Christian leadership formation programmes and processes for ordained ministry (Grundy as cited in Nelson, 1996; see Chapter Five and Six).

The chapter begins with an analytical discussion of four selected Christian formation<sup>28</sup> models (spanning from as far back as the first century of the church's existence) and highlights their connections with clergy leadership formation models emerging in ACSA (Feilding, 1966; Rooy, 1988; Reed, 1995; Harkness, 2000; see 4.4 and 6.3.3.1). An analysis of the probable reasons which may have enabled some of the models under discussion to remain relevant and functional in the work and life of the church for centuries will be done, noting contextual variations and adaptations in the application of the models at each point in time (Rooy, 1988; Morgan & Giles, 1994; Dearborn, 1995).

Further, a synthetic analysis of the four models will be done to bring to the fore the observation that clergy leadership formation models in the church emerge from Christian formation or identity formation programmes (see Annexure 4.4). Based on this observation, the next section in the chapter will discuss Anglican Church practices deemed to form the basis of clergy leadership formation models (peculiar to the Anglican Church, ACSA in particular) from as far back as the Protestant Reformation.<sup>29</sup> Subsequently, the chapter attempts a historical investigation of the clergy leadership formation models which have shaped and given ecclesiastical character to ACSA from her inception to date. Finally, the chapter attempts at highlighting key issues discernible from all the Christian/clergy leadership formation models discussed in the chapter with the objective of establishing how ACSA, through expansive learning (Engeström, 2001), could transform her current clergy leadership formation model(s) towards collaborative and transforming practices.

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<sup>28</sup>Christian formation is understood in the study as the basis for Christian leadership, also referred to as clergy leadership.

<sup>29</sup>Church History accounts that the Protestant Reformation (also referred to as Protestantism) could have begun on 31 October 1517 when Martin Luther (attributed leader of the movement), in protest against the oppressive practices and tendencies of the Medieval church, nailed his Ninety-five Theses to the chapel door of Wittenberg church. Further the Protestant Reformation is understood to have been preceded and greatly influenced by the Renaissance (*rebirth of learning*). The Renaissance is estimated to have happened in the early 1300s. In relation to the Renaissance, the Protestant Reformation was particularly concerned about religious practice (Christianity in particular) and the socio-economic and political implications thereof (Reed & Prevost, 1993; Elias, 2002). Further discussion of these historical phases in the life and work of the church will be done later in the chapter under Section 4.2.4.

## 4.2 CHRISTIAN FORMATION MODELS SINCE THE INCEPTION OF THE CHURCH

The New Testament of the Bible records that the institutional Church<sup>30</sup> began with the physical absence of Jesus under the leadership of the men<sup>31</sup> (apostles) whom Jesus had closely worked with for the duration of his three year ministry (Engeström, 1976; Comby, 1984; Hill, 2007). Through observation, hands on involvement in Jesus' ministry and occasional explicit teaching from the Master<sup>32</sup>, these men had been aptly and sufficiently prepared to take over leadership of the work that Jesus had started (Engeström, 1976; Nelson, 1999; Elias, 2002).

Beyond the generation of Jesus' first hand witnesses (post-apostolic era), teaching and Christian formation in the church took a variety of forms in historical succession, determined by the socio-historical and political developments in the world, particularly in those contexts where the secular world had direct influence on the life and work of the church, such as the Roman Empire (Elias, 2002; Reed & Prevost, 1993; Hill, 2007).

In view of the above, four Christian formation models emerged within which distinct Christian/clergy leadership formation models were created (Reed & Prevost, 1993; Nelson, 1999; Elias, 2002; Mwangi & de Klerk; 2011). I discuss the four Christian leadership formation models next.

### 4.2.1 Catechetical model (apostolic & post-apostolic eras)

“Catechetical” is a word derived from catechesis<sup>33</sup> (κατηχέω in Greek) which means “to teach orally; ... to echo” (Elias, 2002, p. 18); “to celebrate or imitate, to repeat another's words or

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<sup>30</sup>*Institutional Church* refers to the Church as a structured, hierarchical establishment (Dulles, 1978).

<sup>31</sup>*Men* is used here to refer to Jesus' disciples after he had ascended into Heaven. Biblical hermeneutics provides analytical tools with which to engage critically on the question of whether it is defensible to claim that Jesus' immediate disciples were exclusively men, particularly in the latter part of the New Testament which accounts events post Jesus' death, resurrection, and ascension.

<sup>32</sup>*Master* was one of Jesus' titles attributed to Him by His followers during His ministry. It is synonymous with Lord, another title given to Him in the Gospel narratives. In the Roman Empire, “Lord” was used for Caesar and indicated his absolute power as monarch but did not mean that he was a god. “Lord” appears as a title for Jesus in the New Testament to declare his royal authority as one who was raised from the dead to sit at God's right hand (American Bible Society Resources).

<sup>33</sup>Terms used in literature which derive from catechesis include catechise, catechism, catechumenate (instruction of new adult converts) and catechetics; catechumenoi (adult converts in preparation for baptism) (Elias, 2002).

deeds” (Westerhoff, 1981, p. 2). The New Testament post-Jesus narrative<sup>34</sup> emphasises that the Apostles, following in the footsteps of their Master after He had ascended into Heaven, prioritised teaching as a fundamental activity which would enable and enhance the advancement and growth of the church numerically, doctrinally, geographically and in formation of future Christian/clergy leadership (Westerhoff, 1981; Grundy as cited in Nelson, 1996; Blackaby, 2001; Cole, 2009). As such, in the later section of the biblical New Testament, we read about these men engaged in missionary work, beginning in Jerusalem to other different parts of the world including Africa<sup>35</sup> (Groves, 1948; Parrinder, 1969; Comby; 1984; Baur, 1994; Isichei, 1995; Hill, 2007). In the process of teaching about Jesus and Jesus’ ministry, they also nurtured<sup>36</sup> Christian leaders in and for each community with which they would have interacted (Engeström, 1976; Gangel, 1989; McNeal; 2000; compare with model discussed in 4.4.2.1). Emerging in these earliest stages of the life and work of the church is a community orientated type of Christian/clergy leadership premised on:

- i) the teaching and life style of a leader (Jesus). This begins with the Apostles and is inherited by those whom they chose to lead local communities, and future generations of leaders. Engstrom (1976) suggests that this model begins more effectively with the Apostle Paul whose ministry moulded “Timothy, Silas, Titus, Epaphroditus, the Ephesian elders, and many others” (p. 45).
- ii) faith, commitment and individual gifts in those chosen for Christian/clergy leadership in local communities.

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<sup>34</sup>“In the first few centuries after Christ’s death, there was debate and confusion over diverse teachings as doctrinal issues began to be more carefully examined. Apologists (church leaders) wrote in response to persecution and to counter false accusations regarding Christian beliefs. Their works were originally addressed to the Roman Emperor but were widely read by church leaders and used to instruct others concerning the faith” (Lawson as cited in Anthony, 2001, pp. 18-19).

<sup>35</sup>The Alexandrian Catechetical School in Africa (Egypt) is a prime example of the centres of teaching and learning which emerged in the first two centuries of the life and work of the church, with the specific goal of creating educational opportunities for theologians, priests and Christians to engage more reflectively, systematically and rigorously on theological concerns of the day, given an environment of pervasive false teaching. The curriculum of the school also covered secular learning disciplines such as Mathematics, Astronomy, Biology, Literary criticism, and others. The school is associated with eminent personalities in the field of theology such as Clement of Alexandria; Origen and Athanasius. As was the case with other catechumenal schools, this school developed as an ‘affiliate’ of the Church, possibly the Cathedral, and was overseen by the local bishop (Reed & Prevost, 1993; Croft, 1993).

<sup>36</sup>“Nurture” as used in the biblical New Testament has feminine innuendos. For instance, in 1 Thessalonians 2:7-8 Paul used the word to imply the gentleness akin to the qualities of a nurse. The question that comes to mind is: why only women? In his interpretation of the verse, Engstrom (1976) says, whereas “we identify masculinity with toughness and ruggedness, God identifies it with tenderness. We think of leadership as ‘handling’ adults, but God thinks of it as nurturing children” (p. 44).

From about the 2<sup>nd</sup> century, a three-tier church governing structure begins to emerge, namely the offices of the Apostles, Elders and Deacons.<sup>37</sup> When the Apostles died out, they were replaced by bishops (Campbell, 1990; Croft, 1999).

#### **4.2.1 Later developments regarding catechetical schools**

Lawson as cited in Anthony (2001) posits that “by the late second century, some of the catechumenal/catechetical schools began to expand their curriculum to include higher theological training as well as philosophy, logic, and rhetoric (see 4.2.2). One of the goals of these catechetical or cathedral schools was to refute heresy that had crept into the church after the death of the apostles” (p. 19). It was from this point in the history of the church that bishops (monarchical episcopate) took over the responsibility of church related educational programmes and, when the church became a recognised institution of the Roman Empire, such programmes received government support (Reed & Prevost, 1993; Lawson as cited in Anthony, 2001; Elias, 2002; Hill, 2007).

A critical turning point in the history of the catechetical model of Christian formation came in the 4<sup>th</sup> century when, “in the midst of tensions over doctrinal orthodoxy, catechetical schools gained reputations as seedbeds for heresy and (as a result), came under closer scrutiny” (Lawson as cited in Anthony, 2001). This resulted in most of the schools closing down, which implied reduction in availability of formal education and training for those who would be future leaders (clergy) in the church. The seriousness of this development on Christian/clergy leadership is captured in the following quotation:

Many clergy members of the late fifth century and following were illiterate, having come into their positions through an apprenticeship model of leadership development without the benefit of formal instruction. Loyalty to the church and its doctrines became more important than extensive education, even in the study of Scripture. Obedience to church hierarchy and tradition characterised the growing institutionalism of the church and the weakening of its educational institutions (Lawson as cited in Anthony, 2001, p. 19).

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<sup>37</sup> Hill (2007, p. 50) alludes to a different school of thought on how the governance structures of the church came into being. Based on evidence drawn from anonymous documents which were written in the early phase of the life and work of the church, this school of thought subscribes to the opinion that the bishop had a secondary role to that of *prophets* and *teachers*. This suggests the likelihood of a multiplicity of ways through which church governance structures were developed in different places where the gospel had been planted and church communities established. However, Hill (2007) surmises that by the close of the 2<sup>nd</sup> century, “a roughly uniform system had settled into place of bishops, priests and deacons” (p. 50).

In the wake of these developments regarding the catechetical model of Christian formation (within which was Christian/clergy leadership formation), other models emerged, namely: the monastic, scholastic and seminary models, in historical succession.

#### **4.2.2 Monastic model**

Monastic and monasticism (words commonly used in literature) are derivatives of the word monastery which comes from the Greek word *monos*, which means “one who lives alone” (Foster, 1972; Comby, 1985; Reed & Prevost, 1993). In terms of Christian practice, the term refers to those who denounce the world and devote themselves to the worshipping and serving God (Comby, 1985; Elias, 2002). In relation to Christian formation, the “separateness” phenomenon came into being in the 4<sup>th</sup> and 5<sup>th</sup> centuries as a result of the decision which had been taken by the Roman Empire to grant official recognition to the Church (Reed & Prevost, 1993; Elias, 2002; Hill, 2007; Mwangi & de Klerk, 2011). This development impacted the Church and the State (Roman Empire) in the following ways:

Regarding the Church: because the Church had been accepted by the “world” (Roman Empire), some people felt that it had, as a result, lost its divine character; it had become worldly. Faithful Christians decried that such a development was a grave contradiction of the gospel message which emphasises reverence and obedience to Jesus and not preoccupation with the affairs and needs of the material world (Foster, 1991; Comby, 1985; Hill, 2007).

Regarding the State (Roman Empire): Church historians hold that the socio-political and economic status quo of the Roman Empire had deteriorated at this point in time, which is estimated to be around 476. This was about the time when the Church was accepted formally as a state religion. Church historians surmise that the prevailing circumstances in the Roman Empire demanded mutual cooperation from the two parties (Church and State) for survival, either way. The extent of the involvement of the Church in State affairs, inclusive of the glitter, pomp and corrupt tendencies that went with it, could not be tolerated by a significant number of the faithful Christians. Generally, the State had sunk into incomparable levels of moral decadence (Comby, 1985; Reed & Prevost, 1993; Elias, 2002; West, 2003; Mwangi & de Klerk, 2011).

As a result of these developments, “some men and women<sup>38</sup> left the *world* because they despaired of it; others left the worldly Church for the more devoted life of the Monks” (Foster, 1991, p. 154). Key aspects of monastic life<sup>39</sup> mentioned and discussed in the literature include the following:

- (i) practice of silence; prayer; fasting (ascetic life); study;
- (ii) simplicity; discipline; obedience; chastity; vow of poverty;
- (iii) regular reflective reading of Scripture; confession;
- (iv) value work – particularly within the area of one’s giftedness.

Monastic rhythm of life necessitated teaching and learning<sup>40</sup> programmes for novices (Elias, 2002). Schools and other educational facilities such as libraries and writing rooms<sup>41</sup> were accordingly introduced in monasteries with the passage of time. In addition to serving the educational needs of novices and trainees, these schools also created opportunities for ordinary people in nearby communities to attend classes, since State service systems had literally become dysfunctional (Reed & Prevost, 1993; Elias, 2002). Lawson as cited in Anthony (2001) describes these developments in the following way:

As catechetical schools declined and the monastic movement flourished, education became a major feature of monastic life. Initially monks were solitary, but communities of learners grew up around respected Monks (desert fathers), forming the beginning of communal monastic life. Many of the novices who came to join these cloisters were illiterate and untaught in the basics of Christian faith and practice. Monasteries established schools where those who wanted to join (*interni*)

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<sup>38</sup>Certain terms are used to refer to different groups of men and women who chose to withdraw from their communities to secluded places for religious reasons: **Monk** (man) – comes from the Greek *monachos*, which translates as *solitary*; **Hermit** – comes from the Greek *eremos* which translates as *desert*, denoting someone who lives in the desert away from human society; **Anchorite** – comes from *anachorein*, which translates as *withdraw, take to the hills* – signifying someone who has left the world (Comby, 1985, p. 81).

<sup>39</sup>Different monastic schools were founded and developed in this period. Normally, each school was organised in accordance with specific guidelines which helped to regulate routine activities in the community and behaviour of the community members. An example of such a school is the Benedictine spirituality whose founder, St. Benedict (ca 480 – 543) is considered as one of the main architects of Early Medieval communal monasticism ([www.saylor.org/courses/hist201/#1.4.1](http://www.saylor.org/courses/hist201/#1.4.1)). Benedictine order of life (Rule of Life) emphasised the need for monastic communities to endeavour to balance their routine engagements between prayer & contemplation, learning, work and community life (Reed & Prevost, 1993; Elias, 2002).

<sup>40</sup>A particular form of learning originated within the monastic model of Christian formation, the *lectio divina*, the slow and meditative reading, often out loud, of the word of God for purposes of spiritual nourishment. It was oriented toward *meditation* (reflection, reminiscing, and ruminating) and *oratio* (prayerfulness). The sermon or spiritual talk also originated within monasticism (LeClerq, 1961, p. 72).

<sup>41</sup>Writing rooms refer to facilities which were availed in monasteries for purposes of duplication and translation of Christian reading resources which included the Bible and early Christian writings.

and those from surrounding community (*externi*) could come and learn reading, writing, arithmetic, prayers, and Scriptures. This education was designed for those who would serve the Church but often benefitted others in the community (p. 20).

The Latin expression *ora et labora* (pray and work) could be considered as the framework of the monastic model of Christian formation, particularly in relation to the Benedictine spirituality which has been instrumental in shaping the contours of monasticism over the many generations of Christian practice (Elias, 2002). It is therefore appropriate to conclude that monasticism, with its emphasis on literacy (across all spheres of the academia), moral uprightness, community life, value and dignity of manual work and discernment of God's presence in everyday human engagements, must have helped to create an image of the early medieval monk as an ideal character who could be emulated by all community members, particularly those being prepared for Christian/clergy leadership (West, 2003).

#### **4.2.3 Scholastic model**

Scholastic and scholasticism are terms which are used interchangeably in literature to refer to the type of education which developed in urban Europe from about the 9<sup>th</sup> century – the so called Late Middle Ages – in response to contemporary and contextual needs. In the period that monasticism was thriving, as discussed in the previous section, the Church was requested by local governments to consider creating schools in cathedrals and other church properties to cater for the educational needs of urban clientele, particularly those who would be employees in government offices. Also, the schools would serve the needs of the so called “secular clergy” (Elias, 2002, p. 51), that is students in leadership formation for ordained ministry who did not take the monastic formation route.

By the 9<sup>th</sup> century, the small groups which had started meeting with revered learned members of the community (professors, also referred to as proclaimers), developed into universities (Groome, 1991; Elias, 2002; Hill, 2007). The curriculum which was offered included the seven liberal arts: “*trivium*: grammar, rhetoric, dialectic; *quadrivium*: arithmetic, geometry, music, astronomy; philosophy; canon and civil law; theology, and medicine” (Lawson as cited in Anthony, 2001, p. 20).

Describing these schools, Jaeger (1994) asserts that:

They were humanistic in various senses of the word. They aimed at the development of the articulate individual, (one's) integration into society, (one's) active role in

politics and administration. They aimed at humanising the individual and through the humane individual, society. They cultivated poetry, oratory and conduct based on classical models (p. 194).

In terms of facilitation approaches, this type of education was rooted in theology and Greek philosophy, basing on the philosophical postulations of Aristotle. In that sense, “philosophy was wed to theology, with theology taking precedence and setting the agenda for philosophical inquiry” (Lawson as cited in Anthony, 2001, p. 20). The rationale for such an educational approach was grounded in the belief that improvement of human ability to reason would position humanity favourably in the quest to “construct a rationally defensible and systematic presentation of Christian beliefs” (Groome, 1991, p. 55). This suggests strongly that scholastic interest in theology was less for spiritual formation towards Christian maturity, but more for intellectual longings to rationalise God related matters, thus serving the needs of the individual more than those of the community (Groome, 1991; Reed & Prevost, 1993; Hill, 2007). As a result, the spirit of community – which ought to be the basis of church practices – was jeopardised.

Methodologically, scholastics used Aristotle’s theoretical framework, though intentionally they excluded its contemplative dynamic in dialectical<sup>42</sup> engagements such as debates and argumentative discussions. In view of this, Professors were required to encourage students to question (*quaestio*) and debate (*disputatio*) rather than expect to receive and imbibe information unengaged in the learning encounters (Groome, 1991; Reed & Prevost, 1993; Elias, 2002).

Butler (1957) illustrates how arguments or debates were constructed in scholasticism:

- (i) Requiring philosophical analysis: words would be examined and argued to have multiple meanings.
- (ii) Requiring logical analysis: relied on the rules of formal logic to show that contradictions did not exist but were subjective to the reader.

Such engagements enabled scholastics to:

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<sup>42</sup> Bowen (1975, p. 65) defines dialectic as “clear-sighted argument which separates the true from the false.” In relation to that, he defined rhetoric as “the discipline of persuading to every suitable thing”. Further, Bowen thought that students of his day, whether from ignorance or from unwillingness, failed to hold a fitting method of studying and, as a result, most of them did not benefit optimally from their studies – many studied, but few emerged wise.

examine contexts of passages; eliminate corruption in the text (*pagina*); make comparisons between disputed passages with others of proven meaning; make sure there were no retractions of opinions; search for the facts that led to the decision of the church; if incompatibilities still remain then one should conclude that this was a mystery to be believed or that a theory was needed to reconcile the views (Broudy & Palmer, 1965, pp. 62-63).

It is feasible to conclude that scholasticism ushered in Europe a new culture of critical inquisitiveness about issues relating to knowledge, faith and belief systems. Phenomena could no longer be taken for granted or assumed to represent or mean unproven truths but would now be subjected to systematic interrogation, with the goal of reaching logical conclusions on matters of concern. In doing so, the ability to think in human beings was observed (Reed & Prevost, 1993; Elias, 2002).

On the flipside, critics of scholasticism have decried the disinterest of the model in the potentially transforming relationship between faith and praxis; it was all about the mind which, as a result, excluded the ordinary rural clergy (Groome, 1991; Lawson as cited in Anthony, 2001). Further, scholasticism has also been heavily questioned in relation to the advancement of a theological and philosophical argument that suggests “the power of dialectic or human reasoning as applied to faith” (Elias, 2002, p. 52). For that reason, as will be discussed in the next section, mysticism emerged as an alternative to scholasticism, with Thomas Aquinas<sup>43</sup>, one of the eminent scholastics, setting “limits to the power of reason to prove spiritual truths, maintaining that the mysteries of faith could neither be discovered nor proved by unaided reason” (Best, 2008, p. 28).

The seminary model of Christian/clergy leadership formation is a Renaissance-cum-Protestant Reformation phenomenon (Hill, 2007; Mwangi & de Klerk, 2011). Therefore, it makes logical sense to first discuss the developments which happened in the period between the 14<sup>th</sup> and 16<sup>th</sup> centuries – which covers the Renaissance and the Protestant Reformation periods – before I discuss the seminary model of Christian leadership formation.

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<sup>43</sup>In support of Thomas Aquinas, a number of other scholastics in the Middle Ages also began to challenge scholasticism arguing that God could only be known through faith, not by logical deduction. “God was beyond all knowledge. Sensory experience and reason led to knowledge, but God was not accessible to the senses and therefore must be apprehended by faith” (Lawson as cited in Anthony, 2001, p. 20).

## 4.2.4 Renaissance and Protestant Reformation: Implications on church leadership formation

### 4.2.4.1 Antecedents of the Protestant Reformation

Europe of the Late Middle Ages (about 10<sup>th</sup> - 15<sup>th</sup> centuries) had been Christianised to an extent that it became very difficult to distinguish between secular and sacred engagements in the work and life of the church<sup>44</sup>. Tragically, the church increasingly became secularised implying, among many other socio-economic and political engagements, obsession with wealth in the form of money, land, homes and other material resources accruable. Above all, church leadership (clergy) became power hungry and, consequently, very corrupt (Rowdon, 1971; Reed & Prevost, 1993; Greig, 1999).

As a result of these tragic developments in the church, theological education and ministerial training programmes were adversely affected. Clergy literacy and ministerial training sank to such low levels as warranted prohibition of use of the Bible by both clergy and the laity, for fear they would misinterpret the biblical message (Reed & Prevost, 1993).

A popular reference case used in literature with a focus on these unfortunate developments in the church is research which was done by Bishop Hooper, an English church leader during this time. He surveyed 311 English clergy on matters relating to church beliefs and practices and had the following results: 168 “were unable to repeat the Ten Commandments. Thirty-one did not know where to find them. Forty could not tell where the Lord’s Prayer is to be found and thirty-one did not know the Author” (Benson, 1943 as cited in Reed & Prevost, 1993, p. 168).<sup>45</sup> This *status quo* weakened the vocation of the Church, particularly in the area of leadership formation.

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<sup>44</sup>Contrary to the message of the gospel regarding attitudes towards wealth and self-aggrandisement, Popes and senior clergy allocated themselves palaces and lived the life styles of princes. Other corrupt activities of the church included: **simony**: “a sacrilege that consists in buying and selling what is spiritual in return for what is temporal. In simony the person tries to equate material things, such as money, with spiritual things, such as divine grace, and treats the latter as though he or some other human being had full ownership of what really belongs to God” (<https://www.catholicculture.org/culture/library/dictionary/index.cfm?id=36482>); **sale of indulgences**: “the absolution of sins by payment of money” (Reed & Prevost, 1993, p. 167); **sale of relics**: “objects venerated because of their association with a saint or martyr” (*ibid.*, 1993, p. 168). “Abuse became so rampant that indulgences were sold in advance for sins yet to be committed” (*ibid.*, 1993).

<sup>45</sup>During this period, it was public knowledge that many of the clergy had come to their offices through political manoeuvring. As such, it was a common opinion among Christian believers of the time that the clergy were “miserable wretches ... previously raised from beggary, and who had been cooks, musicians, huntsmen, stable boys and even worse.” Unlike was the requirement in previous centuries, clergy in the Middle Ages did not need to learn so as to teach the

In line with the focus of this study, such developments in the church brought to the fore the need for the church to be consistently intentional and purposeful in conceptualising, designing and facilitation of clergy leadership formation programmes as this has critical implications on the work and life of the church.

Coupled with the above were the socio-economic and religious implications of the different understandings among people of the *en vogue* concept, Renaissance<sup>46</sup>. Whereas the Middle Ages (presented earlier in this chapter as the era of monasticism) had “deemphasised the individual and focused attention on the soul and the church”, the emergence of the Renaissance, which preceded the Reformation, “portrayed a change in attitude toward the ascetic bondage of the human body. The Renaissance awakened imagination about the body from a nap of a thousand years” (Reed & Prevost, 1993, p. 169). The new perspective gave birth to human individualism which, in literature, is articulated in three specialised terms: mysticism, nominalism, and humanism.

**Mysticism**: articulates a belief that an individual believer can experience the reality of God through contemplation/meditation (Reed & Prevost, 1993). As opposed to corporate church engagements led by church leaders such as priests and bishops, mysticism is individual believer orientated. At a time when Christians were undergoing the worst of experiences under self-centred, unethical and immoral leadership, coupled with the mental demands of scholasticism, mysticism was perceived as divine intervention intended to give individual Christian believers the choice to commune with God in ways preferable to each person. As such, mysticism advocated the emancipation of the individual believer from the oppressive and materially founded traditions and practices of the medieval church (Reed & Prevost, 1993; Griffiss, 1997; Hill, 2007).

**Nominalism**: emphasises the uniqueness of human experiences, thus counteracting the religious traditions prior to the Renaissance and Protestant Reformation which undermined

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scriptures intelligently, for the church told them what to do. “Even the superior clergymen were sunk in great ignorance in spiritual matters. They had secular learning but knew very little of the Bible”. ([http://www.thirdmill.org/newfiles/jac\\_arnold/CH.Arnold.RMT.1.html](http://www.thirdmill.org/newfiles/jac_arnold/CH.Arnold.RMT.1.html))

<sup>46</sup>“The Reformation had its roots in one of the most remarkable periods of European history, the Renaissance, which took place between approximately the fourteenth and sixteenth centuries. In some ways it represented a development of medieval thought and practices, and in other ways it was a rejection of them. The combination of these different elements meant that it was sometimes a confusing time, and sometimes a time of conflict; but also, for many, it was a time for continuity. No one was aware at the time that the Middle Ages were coming to an end, any more than their predecessors had known they were living in something called ‘the Middle Ages’ in the first place” (Hill, 2007, p. 240).

individual religious expressions in word (opinion) and deed (spirituality) (Reed & Prevost, 1993; Griffiss, 1997).

**Humanism:** focuses on life presently lived more than the spiritual life to be lived after death which was the preoccupation of the medieval church (Reed & Prevost, 1993). Humanism therefore places primacy in the value and agency of human beings, individually and collectively, as opposed to uncritical acceptance and perpetuation of old traditions and practices which, in some instances, subject other people to inhumane conditions of living. What this says about human beings is that, under normal circumstances, they have the potential to think through their everyday activities in relation to the realities of their surroundings, what Sayer (2011) understands as “people’s first person evaluative relation to the world” (p. 2). Norman (1998, pp. 215-216) summarises the spirit that undergirded humanism in the following two ways:

- i) “A conception of what makes for a worthwhile and fulfilling human life, and in particular some conception of what can give meaning to a human life in view of the finite character of that life and the inevitability of death”.
- ii) “A conception of one’s relations to other human beings – both special relations to particular others and to particular social groups and communities, and relations to other human beings in general, including past and future generations”.

In view of the above, it is feasible to surmise that the Renaissance was a ground-breaking experience for the church towards the reformation of medieval church traditions and practices with an unprecedented interest in the abilities and preferences of the individual believer (Rowdon, 1971; Reed & Prevost, 1993). Integral and fundamental to the Protestant Reformation would be a revamp and re-orientation of theological education and ministerial formation programmes, in observance of the need to ensure that “the perceived needs and challenges of the prevailing culture and context would be taken care of by adequately educated and trained clergy” (Percy, 2013; p. 36).

#### **4.2.4.2 The Protestant Reformation period**

Martin Luther (German and an Augustinian Monk) has been attributed the leadership of the Protestant Reformation whose focus was condemnation of the corruption and abuses associated with the church of the Middle Ages. Other Protestant Reformers discussed in

church history include Ulrich Zwingli and John Calvin of Switzerland, among many others (Reed & Prevost, 1993; Elias, 2002; Hill, 2011).

In the spirit of scholasticism, Martin Luther had first intended to initiate a small scholarly debate on “the *sale of indulgences* (payment for forgiveness of sins) which had developed in the later Middle Ages as an important source of revenue for the church” (Hill, 2007, pp. 249-250). Two issues which particularly disappointed Martin Luther about this practice were: the doctrine (church teaching) which supported the practice (as will be explained in the next section); and the manner in which the money accrued was being used. When Martin Luther posted on church and university doors his invitation for a debate on the matter in the form of his famous “95 theses” or short statements, his concern became much bigger and consequently attracted a much bigger *audience* than he had initially anticipated and intended it to be (Hill, 2007). Such a response could suggest that the matter in question had been a huge concern for all the faithful members of the church for a long time.

#### **4.2.4.3 The fundamental principles of the Protestant Reformation**

Unavoidably, the Reformers of the 16<sup>th</sup> century came into conflict with the Roman Catholic Church on a number of issues which included:

**The supremacy of Scripture:** Martin Luther believed that the authority of the Bible is greater than that of the church. When Martin Luther openly denounced the corrupt practices of the church, inclusive of the *sale of indulgences*, he met with the resistance and condemnation of the Vatican (the seat of the Roman Catholic Church) which was of the opinion that the Pope and the Councils who had sanctioned such practices could not have been mistaken. Martin Luther was deeply wounded by what he considered as the arrogance of the top brass of the church. It had been his hope that his opponents would at least base their arguments on Scripture. Instead, they ignored his theologically supported statements and chose to summon him to Rome for a trial for heresy (false teaching) (Hill, 2007, p. 251).

**Justification by faith:** Hill summarises Martin Luther’s understanding of the crux of the biblical message as the basis of the Protestant Reformation as follows:

At the heart of the Protestant Reformation was a doctrine that Martin Luther had stumbled across while studying Paul’s letter to the Romans at Wittenberg, and whose consequences he was still working out. This doctrine, *justification by faith*,

was at the heart of his theology. Martin Luther was convinced that the central message of Christianity was that people are saved not by what they do – whether by paying money to the church, going on pilgrimages, obeying the Pope or anything else – but by a free gift, given through Christ’s sacrifice and accepted by the believer through faith. This was the basic notion that drove Martin Luther’s criticisms of contemporary Catholic views and practices and it would remain central to the whole Protestant movement after him (2007, p. 252).

**The priesthood of the laity:** On the basis of his conviction of the supremacy of the Bible over and above church rules and regulations and the doctrine of “justification by faith”, Martin Luther argued that all baptised members of the church should be afforded free educational opportunities, including theological education. This would entail that all baptised members of the church would be privileged with unconditional access to the Bible in both the vernacular and original languages, and basic theological information. Studying the Bible would empower them spiritually, thus enabling them also to minister to other people through deed and words. Martin Luther put into practice his convictions by introducing catechism for both the laity and ill prepared clergy (Lawson as cited in Anthony, 2001; Hill, 2007).

It is justifiable to say that the Reformers, mainly Martin Luther<sup>47</sup>, facilitated transformation in the life and work of the church particularly where it concerned doctrine (church teaching); belief systems; practice and Christian identity. These are critical matters which define the Christian faith, the bedrock of Christian/clergy leadership. This brings to the fore the emphasis which was placed on these issues in the catechetical model of Christian formation as discussed earlier in Section 4.2.1. In view of this observation, Reed and Prevost (1993, p. 189) state that “Luther and his followers desired a *restoration* of the apostolic church”. Lawson as cited in Anthony (2001, p. 21) makes a similar observation when he asserts that “the corruption of the church and renewed study of Scripture in the original languages provoked calls for reform and a desire to return to a purer faith”, implying the Apostolic church before Rome had gained power and authority (Griffiss, p. 23).

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<sup>47</sup>Martin Luther made an invaluable contribution to the Protestant Reformation by leading the whole process; translating the Bible into German; stressing the educational role of the home and state, calling attention to the educational needs of common people; preparing catechisms, and writing hymns for congregational worship. He revamped education around the theme of faith in God. He emphasised that its purpose was to develop Christian character in children who, as a result, would better serve God, church, state, and society. He believed that education should be holistic. Further, Martin Luther was of the conviction that the preservation of truth in Christianity depended significantly on the ability to interpret the original biblical languages. As such, he highly recommended the study of Greek and Hebrew in his schools (Reed & Prevost, 1993, pp. 192-194).

The above observations imply that the Protestant Reformation was a wake-up call to the church to go back to the basics, the catechetical and monastic models of Christian/clergy formation where “there were no seminaries, academies, or theological faculties but devout monks and Christians who drank living waters of divine knowledge from hymnology” (Schmemmann, 1965, p. 228). Annexure 4.2 is a pictorial presentation of the flow of events leading up to the Protestant Reformation.

#### **4.2.4.4 The status quo of theological education during the Protestant Reformation**

It can be argued that scholasticism, with its emphasis on critical engagement of issues, created fertile ground for open criticism of church belief systems and corrupt practices. We can therefore surmise that the Reformers were products of their local contexts.

The university continued to be the primary facilitator of training for those being prepared for the ministry of the church (clergy leadership). However, with the unfolding events of the Protestant Reformation, cracks of inefficiency of this facilitation began to show (Rowdon, 1971; Greig, 1999). The following quotation highlights those issues of concern:

England was probably the sole country in Christendom where no proof of theological knowledge was required from candidates for ordination. At Oxford theology was reduced to one single question asked of all candidates for examination. At Cambridge no theology whatsoever entered into any of the examination for a degree. The entrance examination once passed, and it was elementary in the extreme, not to say childish, students who were not the eldest sons of gentle families and did not possess sufficient industry or capacity to face more difficult examinations, could proceed without further delay to the clerical status (Halévy, 1924, p. 391).

Rowdon (1971) states that this situation was aggravated by polarised working relationships between the universities and bishops who, on their part, were blamed for failing to manage effectively the learning programmes of their ordinands in collaboration with the universities. As a result, most of the dioceses in England decided to take full responsibility for the training of their ordinands, with the assistance of experienced and learned diocesan clergy. These developments led to the formalisation of the seminary model of theological education and ministerial formation of church leaders.

#### 4.2.5 Seminary model

As has been discussed previously, the scholastic model of Christian formation came to a crescendo in the Reformation period (1517-1648) where attention was drawn to the extent of clerical ignorance and ineptitude in responding to the socio-political and religious challenges of the day (Rowdon, 1971; Reed & Prevost, 1993). In response to this *status quo*, a pronouncement in relation to clergy training was made at the Council of Trent (1545) requiring all cathedrals and greater churches to “maintain, educate religiously, and train in ecclesiastical discipline a certain number of youths of their city ... in a college<sup>48</sup> to be chosen by the bishop” (Bullock, 1995, p. 5).

Details of the seminary educational and training programmes included “rigorous biblical exegesis; use of original biblical languages (Hebrew and Greek); drilling in historico-grammatical analysis beyond the allegorical interpretation approach commonly used then; systematic theology; and logic” (Rowdon, 1971, p. 7). In terms of facilitation methodologies, the model was premised on a schooling mind-set where qualified professors, with the assistance of mentors<sup>49</sup> drawn from a pool of more learned clergy in the community, ran the programme (Banks, 1999). The duration of the programme was structured as: three years of philosophy; four years of scholastic theology, and three years of moral theology. Overall, Bishops, as with other church matters, exercised oversight of the whole educational and training process (Rooy, 1988).

However, with the passage of time, negative criticism was levelled against the seminary model of Christian/clergy formation. Critics have particularly expressed a concern regarding what suggests an imbalance in the three critical aspects of the model which are categorised under the words “know” (cognitive/intellectual), “do” (praxis; procedural), and “being” (spirituality/character) (Rooy, 1988). The inadequacies of the model have been articulated in the following ways:<sup>50</sup>

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<sup>48</sup>Bullock, elaborating the envisioned role of the seminary wrote that only “the best seeds would be planted, watered by abundant showers from the branches of the sciences until they (had) grown to such maturity that they may be thence transferred into the Church, so that it may by feasting richly upon their fruit grow into the fullness of Christ” (1995, p. 4).

<sup>49</sup>In view of the role of mentors in the work of seminaries, Rowdon also calls the facilitation model “cooperative method of training” (1971, p. 7).

**Table 4.1: Information is based on perspectives shared in *The M.J. Murdock Charitable Trust Review of Graduate Theological Education in the Pacific Northwest, USA***

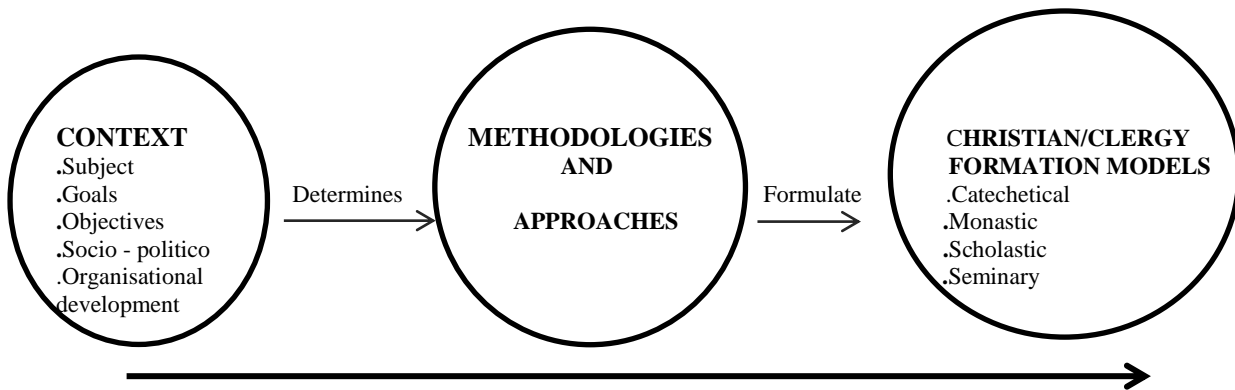
Particular observation made by critics	Explanation of observation made
Separation of head and heart.	The view is that the seminary model has an emphasis on the ‘know’ (cognitive) category of formation and less on ‘do’ (praxis) and ‘being’ (spirituality/character). As such, the model is criticised for not enabling holistic formation of students.
Separation of theological education from Church life and ministry.	This sentiment builds on the above. The assumption is that since the seminary formation model is thought to be primarily focused on the academic or intellectual development of students, logistical collaboration possibilities between seminary and churches are compromised. As a result, students are deprived of opportunities to put into practice, with guidance and supervision, the theory learnt at the seminary. Further, this critique seems to suggest that the process of planning, facilitation and management of Christian/clergy formation programmes should be a concerted effort between Church and seminary personnel so as to ensure an establishment of a seamless and collaborative programme for the students (refer to Chapter Five, Six, Seven, Eight).
Seminary has come to be viewed as a poor investment for ministry preparation.	The question posed here is: why use seminary formation programmes if, for all intents and purposes, there is little effort by the seminary and the church to collaborate so as to ensure students receive holistic formation? Whereas it is the general assumption that the seminary graduates feed into the church, to deprive them of practical church ministry exposure during their seminary time tantamount to short changing them and their future ministerial beneficiaries.
Entrenched traditionalism has led to seminaries being structurally irreformable.	The observation made here is that ever since the seminary model of Christian/clergy formation emerged (in the Reformation era), there has not been significant reformations on the programme particularly regarding curriculum, facilitation or teaching methodologies and governance structures. What has changed though, without doubt, and many times over the centuries of the existence and work of the church, is context. Personnel in the responsibility of leading and managing seminaries are here challenged to design Christian/clergy leadership formation programmes which enable holistic development of students. In other words, what is emphasised here is the need for seminary formation programmes to aim to equip and empower students with knowledge, skills and values necessary for them to be faithful and diligent church leaders who respond relevantly and effectively to contemporary needs in context.

#### **4.2.5 Analysis of Christian formation models in relation to clergy leadership formation**

Maxwell (1995, p. 107) asserts that “the (holistic) growth and development of people is the highest calling of leadership.” Echoing Maxwell, Callahan (1990) expresses the same opinion by saying that “leadership is about life; life is about leadership” (p. xiv). Fundamental to these scholarly views is the observation that human beings strive to respond to contextual

needs and demands in relevant and effective ways. At the heart of such yearnings lie education and leadership (Callahan, 1990; Ramey, 1991; Nelson, 1999; Doohan, 2007; refer to Chapter Two, Eight, Nine).

The four Christian formation models discussed in the previous section of the chapter bring to the fore what may be understood as a consolidated framework for the facilitation of clergy leadership formation in context, illustrated diagrammatically as follows:



**Figure 4.1: A consolidated framework for the facilitation of Christian formation**

Strongly suggested in this framework is the critical importance of context. Nelson (1999, p. 79) elaborates that the phenomenon “starts with a set of circumstances or a description of the prevailing human condition. The characteristics or identity of the person(s) involved (and their preoccupations) are formed by the cultural environment”. In other words, people engage in particular projects or programmes in response to contextual realities. This affirms the opinion that an attempted investigation of educational (Christian formation) models used in a given teaching and learning programme requires an interrogation of the full context in which the programme is happening. In relation to clergy leadership formation, this suggests that leaders and leadership emerge from a given context at a particular time in the history of the community concerned (refer to Chapter Seven, Eight). Using the suggested framework, I summarise the details of the four models as tabled below:

**Table 4.2: Summarised details of the 4 models of Christian/clergy formation models**

CHRISTIAN FORMATION MODEL	CONTEXT	METHODOLOGIES AND APPROACHES
	<ul style="list-style-type: none"> <li>• Founding member of the movement (Jesus) had left the scene (ascended into heaven) but was anticipated to come back soon.</li> <li>• Those who had been empowered with knowledge,</li> </ul>	<ul style="list-style-type: none"> <li>• Preaching; worshipping.</li> <li>• Teaching (rote and memorisation).</li> <li>• Propheying.</li> </ul>

<p><b>Catechetical Model</b></p> <p>(Apostolic &amp; post-apostolic eras)</p> <p>1<sup>st</sup> - 4<sup>th</sup> Centuries</p>	<p>skills and values about the movement (apostles) had the mandate to carry the Movement forward.</p> <ul style="list-style-type: none"> <li>• The specifics of the mandate were: discipleship, baptism, teaching (Matthew 28: 19 - 20).</li> <li>• Christian community was very concerned with the survival of its doctrines and traditions.</li> <li>• The recipients of the apostles' ministry would be people of all nations; conversion of pagans.</li> <li>• At the beginning, church was exclusively Jewish but increasingly became Gentile with the passage of time.</li> <li>• Majority of Christians were from the lower, less-educated social classes.</li> <li>• Church responding to widespread false teaching/heresy (paganism; Gnosticism).</li> <li>• Because Jesus was expected to come back soon, secular education was deemed unnecessary. There was a suspicion as well of Greek and Roman literature.</li> <li>• Persecution of the Christians.</li> </ul>	<ul style="list-style-type: none"> <li>• Exhortations.</li> <li>• Evangelisation – travelling to communities (missionary journeys).</li> <li>• Correspondences with individuals and communities through epistles.</li> <li>• Fellowshiping in churches and homes of members.</li> <li>• Baptismal creeds.</li> <li>• Baptismal rituals – rooted in Judaism (the religion from which Christianity emerged) but with a new meaning.</li> <li>• Early Christian documents.</li> <li>• Confessions.</li> </ul>
<p><b>Monastic model</b></p> <p>5<sup>th</sup> - 8<sup>th</sup> centuries</p> <p>(Middle Ages)</p>	<ul style="list-style-type: none"> <li>• Intensified persecution of Christians.</li> <li>• Church became an institution of the Roman Empire.</li> <li>• Devout Christians withdrew from mainstream society into secluded places such as deserts for religious purposes.</li> </ul>	<ul style="list-style-type: none"> <li>• Monastic vows: chastity; obedience; poverty</li> <li>• Manual work: i.e. farming and craft-making.</li> <li>• Asceticism seclusion</li> <li>• Catechetical</li> <li>• Scriptorium (writing room): preservation &amp; translation of early Christian faith documents.</li> <li>• Seclusion.</li> </ul>
<p><b>Scholastic model</b></p> <p>9<sup>th</sup> - 13<sup>th</sup> Centuries (Late Middle Ages)</p>	<ul style="list-style-type: none"> <li>• Introduction of university and college education.</li> <li>• Roman Empire and Church working together.</li> </ul>	<ul style="list-style-type: none"> <li>• Dialectic.</li> <li>• Disputation.</li> <li>• Synthesis.</li> <li>• Reason.</li> </ul>
<p><b>Seminary model</b></p> <p>14<sup>th</sup> - 16<sup>th</sup> centuries</p>	<ul style="list-style-type: none"> <li>• Renaissance era</li> <li>• Protestant Reformation</li> <li>• <i>Professionalism</i> of clergy</li> </ul>	<ul style="list-style-type: none"> <li>• Dialectic; Reason.</li> <li>• Disputation.</li> <li>• Synthesis.</li> <li>• Mentorship &amp; conferences.</li> </ul>

#### 4.2.6 Christian/clergy leadership formation post Protestant Reformation

Hill (2007, p. 13) contends that “the history of Christianity is by turns violent, inspiring, shocking, tragic, comic, or just plain bizarre ... it is certainly never dull”. The transition from the Roman Catholic Church of the Middle Ages which was characterised with corruption and abuse, to the Reformed church of the post-Protestant Reformation, came at a huge price.

Many wars were fought which resulted in extensive massacres and socio-economic and cultural displacements (Griffiss, 1997). This, certainly, was a defining historical turn for the church. “At the start of the 16<sup>th</sup> century, there was a single Christian church in Europe. One hundred years later, there were four major ones” (Hill, 2007, p. 268). In England, the Church of England (Anglican Church) had emerged as “the only legitimate church” (Hill, 2007, p. 268).

These developments in the work and life of the church had critical implications on clergy leadership formation, particularly in the Anglican Church. The fundamental question which comes to mind in this regard pertains to the kind of clergy leadership needed in the changing contexts of the life and work of the church. The general assumptions undergirding such an enquiry are that transformational and transformative approaches and methodologies in leadership formation programmes are hugely determined by the realities characterising the context in which the leadership is or will be practiced. Ultimately, the shape of training needed for the attainment of the required leadership would be determined by what the organisation (church) understands herself to be (ecclesiological identity) (Ramey, 1991; Nelson, 1999; Percy, 2013, p. 36).

Since this study is based on the Anglican Church, the focus of the chapter henceforth is on clergy leadership formation programmes and processes in the Anglican Church; beginning with the Anglican Church at a global level and then focusing on the Anglican Church of Southern Africa (ACSA).

### **4.3 ANGLICAN CHURCH CLERGY LEADERSHIP FORMATION MODELS**

The Protestant Reformation made an indelible mark on the identity and work of the church. In view of what has been discussed in the last section, a number of critical issues emerged from the experiences of the church during the Protestant Reformation which would determine how the church was going to progress into the future, particularly with regard to clergy leadership formation approaches and strategies.

### 4.3.1 A denomination in formation

The overarching theme in literature on the history of the Anglican Church<sup>51</sup> in much of the three centuries following the end of the Protestant Reformation (from about 1648) is denominational identity formation. In relation to the goals of this study, the two questions that come to mind in this quest are:

- Who is the Anglican Church post Protestant Reformation? (What is Anglicanism?)
- What kind of clergy leadership was required in the changing contexts of the church?

Avis (2007, p. 24) put this quest succinctly when he suggests that:

One approach to the question of the identity of Anglicanism is to look at various formulations of Anglican self-definition through the centuries, bearing in mind the particular circumstances in which they were made and the audiences to which they were addressed. Anglican exercises in self-definition fall broadly into two categories: first, those that focus on the material ingredients of the Anglican synthesis – in short, what is drawn from the sources of Scripture, tradition and reason – and, second, those that claim a distinctive method, ethos or praxis for the Anglican way. The first is about content; the second is about spirit.

In terms of content, the transition from Roman Catholic Church to Anglican Church as a result of the Protestant Reformation entailed a number of changes which impacted theological understandings of the church, Christian beliefs and practices (Griffiss, 1997; Chatfield, 1998; Avis, 2007). Chatfield (1998) presents these changes as tabled below:

**Table 4.3: Anglican Church self-definition post-Protestant Reformation period**

Area in which changes were made	Specific changes made
<b>Doctrine</b> (Church teaching)	(i) Scripture was prioritised ahead of tradition and reasoning. Whereas Puritans <sup>52</sup> and extreme protestants at the time argued that if Scripture does not expressly allow something, it is forbidden, Anglicans argue that if Scripture does not expressly forbid something, it may be acceptable if common sense, reason and conscience do not indicate otherwise. This

<sup>51</sup>The term “Anglican” first appears in the mid-seventeenth century to refer to the colonial churches which looked both pastorally and canonically to Canterbury (the Seat of the Archbishop of the Church of England), independent from the Roman Catholic Church (Chapman, 2006; Avis, 2007).

<sup>52</sup>“The Puritans were a group of English Reformed Protestants in the 16th and 17th centuries who sought to *purify* the Church of England from its *Catholic* practices, maintaining that the Church of England was only partially reformed” (<https://en.wikipedia.org/wiki/Puritans>).

	<p>came to be known as the principle of indifference in Anglican Church practice.</p> <p>(ii) A stronger emphasis on the grace of God and on the gift of salvation before the performance of good works.</p> <p>(iii) A move from understanding the Eucharist in terms of the ‘sacrifice’ of the Mass, to an understanding of it as memorial, or as symbolic of a real presence Christ.</p> <p>(iv) A reduction in the number of sacraments from seven to two (baptism and Eucharist).</p> <p>(v) Dismantling of the idea of the sale of indulgences (payment for the forgiveness of sins).</p>
<b>Worship</b>	<p>(i) Worship came to be conducted in English.</p> <p>(ii) Worship was now intended to be participatory.</p> <p>(iii) The Eucharist was radically changed to reflect the new theology.</p> <p>(iv) The ritual acts were simplified, and much destruction of the old paraphernalia of worship took place.</p> <p>(v) The Calendar was greatly simplified, with the saints taking a minor place, and the life of Christ a major one.</p> <p>(vi) The Ordinal<sup>53</sup> was revised to reflect a new understanding of the threefold ministry of bishops, priests and deacons.</p>
<b>Theological Education</b>	<p>(i) Scripture was made freely accessible to the laity (ordinary people).</p> <p>(ii) An emphasis was made on preaching from the Bible. A book of high quality sermons, called the Homilies, was produced to improve on the generally poor standard of preaching.</p> <p>(iii) The Bible was translated into a diversity of languages, matching human diversity.</p> <p>(iv) Careful scholarship with the original texts in Hebrew, Aramaic and Greek.</p> <p>(v) A new Catechism was produced.</p> <p>(vi) The Articles of Religion<sup>54</sup> were produced to give a measure of Anglican orthodoxy against Roman Catholicism and extreme Protestant groups.</p>

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<sup>53</sup>“The Form and Manner of Making, Ordaining, and Consecrating of Bishops, Priests, and Deacons, according to the Order of The **Church** of England” (Anglican Church) ([www.eskimo.com/~lhowell/bcp1662/ordinal/](http://www.eskimo.com/~lhowell/bcp1662/ordinal/)).

	(vii) The education of clergy was encouraged strongly, and examination of the clergy strengthened.
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### 4.3.2 A diverse but communal denomination

Chapman (2006, p. 3) asserts that “the Church of England is not the same as Anglicanism”. This stems from the fact that Anglicanism is a global denominational phenomenon. In terms of “method, ethos or praxis” (Avis, 2007, p. 24), “the principle of autonomy has been important to Anglicans.<sup>55</sup> Each country or group of countries has the right to an independent Anglican community which is self-governing”<sup>56</sup> (Chatfield, 1998, p. 18). It can therefore be said that Anglicanism is an expression of Christian communion across cultural, racial and geographical boundaries.

This denominational “spirit” is founded on the understanding that there is not one way of knowing God’s mind and will, but many. In view of this, a 16<sup>th</sup> century priest, Richard Hooker (1553-1600), published what was to be a seminal book on the Anglican Church ethos entitled *Of the Laws of Ecclesiastical Polity* (Chapman, 2006; Avis, 2007). The critical issues which were discussed in the book in relation to Anglican Church ethos as summarised by Chatfield (1998, p. 20), are as follows:

(i) An attempt to understand the mind and will of God would require recourse to Scripture, Tradition and Reason. “Though Scripture has the highest place, it has to be interpreted; and to do this we have to use human wisdom, the experience of our ancestors and the structures which we have inherited”.

(ii) Hooker expounded the understanding that fundamentally, Anglicanism is a broad church, meaning that for as long as Scripture is not contradicted, the denominational ethos is

<sup>54</sup>“The **Thirty-Nine Articles of Religion** together with the Anglican Catechism are the defining statements of Anglican doctrine. They were issued by the Convocation of clergy of the Church of England in 1571 and are printed in the Book of Common Prayer and other Anglican prayer books”. ([www.theopedia.com/articles-of-religion-anglican](http://www.theopedia.com/articles-of-religion-anglican))

<sup>55</sup>“The main structural reform of the English church at the time of the Protestant Reformation was the break with Rome. During King Henry VIII’s reign, the Church of England became a national Catholic church with the monarch as the Supreme Governor. The King used the word *Head*, but the Anglicans were unhappy with that because Christ is the Head of the Church” (Chatfield, 1998, p. 18).

<sup>56</sup> “This principle was of course not observed by the British imperial authorities in their colonial attitudes. But because English Anglicans valued it for themselves, it eventually, after much pain and struggle, was seen as a must for all Anglican communities” (Chatfield, 1998, p. 18). The missionary work of the Anglican Church will be discussed in Section 4.3.3.

embraced and put into practice in diverse ways depending on its context in the world. In other words, the one size fits all approach does not apply to the practice of Anglicanism.

(iii) On the basis of the principle of *indifference*,<sup>57</sup> Anglicanism has been expounded as a denomination where people hold a range of opinions which, often, is uncomfortable practice.

(iv) Hooker also argues that ceremonies, rituals and symbols are important in the work and life of the church but are not of absolute importance. Further, they are indifferent provided they do not interfere with worship of God. Also, on the understanding that doing so would enhance a worshipping experience, variety in ritualistic activities and symbols is allowed.

#### ***4.3.2.1 Anglican spiritualities post Protestant Reformation***

In addition to what was discussed above, the socio-political and religious upheavals of the Protestant Reformation resulted in the formation of different streams of Anglican spiritualities mainly expressed through Evangelicalism, Anglo-Catholicism and Liberalism (Griffiss, 1997; Chatfield, 1998; Chapman, 2006; Avis, 2007).

Evangelicalism within Anglicanism emerged in the 18<sup>th</sup> century as a radical expression of the supremacy of the gospel message ahead of good works or sacraments which were understood as merely symbolic. Fundamentally, Evangelicals were of the opinion that the Protestant Reformation had not done enough to purge the Roman Catholic Church of her socio-religious inadequacies (Avis, 1997; Chapman, 2006). As such, Evangelicalism stressed the total depravity of humanity as a result of the sin originally committed by Adam and Eve, as accounted in the biblical creation stories (first two chapters of the book of Genesis). Evangelicals denied as well that ordination imparted any supernatural gifts and insisted on the sole authority of the Bible in matters of doctrine (Griffiss, 1997).

An interesting observation made in literature on this subject is that those who were in the leadership of Evangelicalism were Anglican priests. As a result of their influence, new

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<sup>57</sup>The *principle of indifference* is also referred to as *Via Media* in literature, which is Latin expression of a middle way or compromise between extremes ([https://en.oxforddictionaries.com/definition/via\\_media](https://en.oxforddictionaries.com/definition/via_media)). Frank England in England and Paterson (1989, pp. 15-16) problematises the concept, arguing that “the Anglican Church as the *Via Media* should not be perceived as a *path between* but rather as a *bridge across*, in the sense that it attempts to be inclusive rather than exclusive in its theologising”. This is a critical methodological tool for both the process of training clergy for ministry in the Anglican Church and the actual ministerial practice. This acknowledgement is made against a background that has seen the Church, particularly the Anglican Church, battling with contentious issues on end from inception. In view of this, Chatfield (1998, p. 30) states that “tension between competing values is part of the richness of the Anglican heritage”.

denominations were created, notably Methodism. However, they have also been attributed with effecting renewal in the existing denominations which included the Anglican Church (Chatfield, 1998).

Anglo-Catholicism emerged in the Anglican Church around about 1833 when it was felt that the State (Roman Empire) would no longer continue setting an agenda for the church, as this was a disregard of the sovereignty of the Church of God<sup>58</sup> (Chapman, 2006; Avis, 2007). This concern was expressed through what has come to be known as the Oxford Movement<sup>59</sup> which refers to the activities and ideas of an initially small group of people (mostly young and spiritually robust Christians) in the University of Oxford who argued against the increasing secularisation of the Anglican Church. Their aim was to seek means and ways to restore the heritage and Catholic doctrines of the Apostolic Church (Chatfield, 1998; Chapman, 2006).

At the heart of Anglo-Catholicism was “a response to a crisis in authority. If Evangelism had thrust the locus of authority from the monarch and the divinely appointed institutions of state to the experience of the individual heart and the truth of scripture, so the Oxford Movement sought to redirect authority towards a supernaturally ordered visible church” (Chapman, 2006, pp. 75-76). According to Chatfield (1998, p. 22), the key issues at stake were:

(i) **Apostolicity and catholicity:** an emphasis of the continuity of the Anglican Church with the early and historic Christian communities and the worldwide church.

(ii) **Incarnational theology:** a recognition that God is involved in the world as well as in the church, and a willingness to be in the hard places. Applied in leadership practice, incarnational theology challenges church leaders to embody their ministerial contexts (see Chapter Nine).

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<sup>58</sup>The question of political authority came first before theology in the initial stages of the Anglican Church. King Henry VIII initiated a break away from Rome on the argument that the Pope of Rome had usurped the authority which was rightfully his. However, it has also been suggested and strongly taken into account that the King had personal issues with the Pope in relation to the annulment of his marriage so that he could marry again with the hope of having a son. When the annulment was denied, the King declared the break away from Rome (Chapman, 2006). “It was not until the reign of Queen Elizabeth I that the Church of England began to settle down and develop a theological understanding of what had been going on” (Griffiss, 1997, p. 23).

<sup>59</sup>An alternative term used in literature for the Oxford Movement is Tractarianism which basically underpins the principles of the movement through a series of 90 Pamphlets entitled *Tracts of the Times* which were published by Oxford in the period 1833-1841 under the leadership of John Henry Newman (Chapman, 2006).

(iii) **Sacramentalism:** a high regard for the sacraments as outward and visible signs of an inward and spiritual grace.

(iv) **Ascesis:** a strict spiritual discipline touching all parts of one's life. In the later phases of the Oxford Movement, an emphasis of this spiritual discipline was shifted to Christian socialism lived out in the inner cities of industrial Britain.

The third "brand" of Anglican spirituality, Liberalism, emerged in mid-nineteenth century in a context of advanced industrialisation and scientific discoveries and explorations in England. According to Chatfield (1997, p. 23), the characteristic emphases of Liberal Anglicanism were:

(i) the need to enter into dialogue with new discoveries in industrialisation, science, history and other contemporary issues of interest.

(ii) the need to take historical and literary criticism seriously.

(iii) a desire to include as many as possible within the Church of England (Anglican Church).

(iv) a consequent tendency to play down *orthodoxy* (right belief) and replace it by *orthopraxy* (right living).

(v) the importance of baptising all people because Jesus Christ longs to receive all.

(vi) the possibility that all might be saved: universalism.

These developments critically impacted both clergy leadership practice at the time and future clergy formation programmes. In terms of the design and planning of formation and training programmes, the Anglican Church, in collaboration with other denominations and universities in some instances, was challenged to establish relevant institutions which were intended to educate and prepare clergy for practical ministry, cognisance of obtaining contextual theological and ecclesiological issues (Greig, 1999; Avis, 2007).

### **4.3.3 Global Anglicanism**

The diversity characteristic of the Anglican Church has been more pronounced in the life and work of the denomination as a global religious phenomenon, expressed through the term

Anglican Communion.<sup>60</sup> Ingrained in the programmes and events which formed part of the historical narrative of this global denominational body were leadership issues at both formation and practice levels. I discuss below two of the many engagements which have helped to mould an Anglican Church Communion, highlighting clergy leadership formation related issues therein embedded.

#### ***4.3.3.1 Anglican Church in mission***

Chapman (2006) observes that it would not have been an unusual thing for a person living during the time of the Protestant Reformation to wonder whether the Anglican Church would mean anything elsewhere independent of the control of the King of England. As the Protestant Reformation was coming to a close (around 1689), Thomas Bray, a priest, “recognised the need for more organised work in colonies,<sup>61</sup> setting up the Society for Promoting Christian Knowledge (SPCK) to encourage literature and education, and three years later, the Society for the Propagation of the Gospel had been established in foreign parts” (Chapman, 2006, p. 96). More missionary programmes were subsequently organised to the “unevangelized” or “heathen” as they were known at the time, which included Africa.<sup>62</sup>

Hill (2007) states that the Renaissance experience in Europe might have ignited interest in Europeans to venture into the world beyond their borders. When the exploration expeditions set off, they happened in two ways: “in one, missionaries went out and sort to convert the people they found. In the other, colonists went and settled in the newly discovered lands, bringing their religion with them more or less incidentally. The two methods were not

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<sup>60</sup>“Anglican Communion is the name given to the collection of particular or national churches throughout the world, most of them owing their origins to the Church of England, and all in communion with the Archbishop of Canterbury. The term was not used before the 1850s when the first colonial churches became independent provinces. The Communion began to develop some form of organisation from the first Lambeth Conference of 1867” (Chapman, 2006, pp. 4-5) as will be presented in Section 4.3.3.2.

<sup>61</sup>The phrase “Anglican Church colonies” refers to the Anglican churches or church provinces which were planted in foreign lands including Africa. ACSA, the context of this study, is one of the 38 Anglican Church Provinces which currently make up the Anglican Communion.

<sup>62</sup>Missionary work in Africa started as early as mid-14<sup>th</sup> century (Hill, 2007, p. 276).

mutually exclusive; missionaries travelled to colonies, and colonies sprang up around missionaries”<sup>63</sup> (Hill, 2007, p. 274).

At the occasion of the Great Convention of 1821, the Anglican Church, influenced mostly by Evangelicals, instituted what was to be known as the Domestic and Foreign Missionary Society whose mandate was to facilitate missionary work in and beyond England with a focus on “social reform, education, care for the poor” (Griffiss, 1997, p. 41). Samuel Wilberforce, Bishop of Oxford in mid-19<sup>th</sup> century, is attributed to have articulated how he understood this “vocation of the British people” as follows:

to leave as the impress of their intercourse with inferior nations, marks of moral and religious teaching and religious training; to have made a nation of children see what it was to be *men* – to have trained mankind in the habits of truth, morality and justice, instead of leaving them in the imbecility of falsehood and perpetual *childhood*; and above all, to have been instrumental in communicating to them, not by fierce aggression and superior power – but by gentle persuasion, that moral superiority, that great gift bestowed by God upon ourselves, true faith in His word and true belief in the revelation of His Son (Chapman, 2006, p. 11).

Such a perspective of missionary work was riddled with leadership shortfalls. It is therefore not surprising to learn that some of the weaknesses of the “vocation of the British people” included:

an undeclared solidarity among white men, especially if settlers and missionaries had the same nationality and faith. Individual missionaries who did not comply with the discriminatory code of behaviour were derided. European paternalism hesitated to entrust Africans with tasks of responsibility. Lack of trust accounted for the missionaries’ doing much for the people but little with the people. They dominated the whole Church life. Though the catechist did the main work in teaching the catechumens, it was the missionary who supervised it and sat over the final examination. Again, the catechist watched over the flock’s discipline, but the missionary set rules and made judgments. The sharing of responsibility with African priests or pastors, and the eventual handing-over was far-away on the horizon. (Eliot Siamonga, *The role of missionary churches in colonialism*, in *The Patriot*, 31 March 2016)

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<sup>63</sup>“There has always been in Anglicanism a tension between official and unofficial mission. Anglicanism was born within this tension. It grew out of English Christianity, the beginnings of which were part of the official mission of the Church in Rome. But Anglicanism was also shaped by the many unnamed Christians whose work brought them to England long before the official mission – soldiers, colonists, traders. Their particular witness formed the *unofficial mission* to England – sometimes in conflict with the desires and motives of the official Church. The official element in Anglican mission developed out of the economic and political expansion of the British Empire through colonialism. Where the English went, the Church of England went. This was always an uneasy marriage. Not all colonisers wanted the Church around at all, because at its most independent it would remind them of the responsibilities towards the people they enslaved or trapped in economic servitude” (Chatfield, 1998). This trend of events would influence the approaches and methodologies used by European missionaries to Africa which includes Southern Africa (Hill, 2007, pp. 274-277).

The *status quo* represented in the sentiments above took a shift when colonial churches, with the attainment of political independence, began to critically reflect on their circumstances, challenging the colonisers to come on board to engage in mutual deliberations on “the whole European imperialist and missionary enterprise” (Chapman, 2006, p. 10). In a context characterised by a politics of resistance across Africa, voices of dissent grew among colonial churches. As a result, “movements developed within the colonies attempting to rediscover an independent history” (Chapman, 2006, p. 10). William Temple, one of the most celebrated modern Anglican Church archbishops of Canterbury, made a proclamation around 1912 that it was inevitable for the Church of England not to change its way of doing things having come into contact with different cultures in different contexts across the globe.<sup>64</sup>

The most radical reaction of the colonial church was the founding of independent churches which came to be known as Independent African Churches (AICs) such as the Ethiopian Episcopal Church which was a break away from the Anglican Church. Part of the goal of this drive was to create an environment in which African clergy leadership would be formed and nurtured in ways which took on board contemporary socio-cultural determinants. It was envisioned that such an approach would help to produce embodied clergy leadership which would, in response to contemporary challenges, effectively deal with the European spiritual and cultural domination (Sundkler, 1961; Turner, 1967; Oosthuizen, 1986).

Despite the challenges discussed above, the Anglican Communion missionary work programme made an invaluable contribution towards transforming underdeveloped communities from its inception. Recently, the Anglican Communion affirmed the rationale of her involvement in the global endeavour expressed in “The Five Marks of Mission”, namely:<sup>65</sup>

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<sup>64</sup>“Unity did not imply uniformity, but was instead a *socialist unity*, where the single life of the whole absolutely depends on the diversity of the parts alike in form and function” (Chapman, 2006, p. 11). What this says to an African Christian is that, while recognising and appreciating that the Church of England had introduced Africa to Jesus Christ in the manner that it was done, to argue about the absoluteness of the English understanding of the salvation story as believed by Christians is to universalise a particular expression of the gospel message. As such, “in any society the Church cannot be more than a limited distance ahead of the society in which its members live. The conversion of the colonies had nothing to do with the conversion of indigenous peoples to the English civic virtues” (Chapman, 2006, p. 12). This was largely an African stance but, in some instances, it was well supported by missionary bishops, for example, William Tozer (around 1862) working in Zanzibar towards “an episcopally led process of Africanization” (Chapman, 2006, p. 110).

<sup>65</sup>According to Griffiss, the Anglican Church understands mission as part of her calling “to witness to the Incarnate Christ in all the conditions of human existence, including politics and economics, war and peace, literature and the arts, and in the

- To proclaim the Good News of the Kingdom.
- To teach, baptise and nurture new believers.
- To respond to human need by loving service.
- To transform unjust structures of society; to challenge violence of every kind and pursue peace and reconciliation.
- To strive to safeguard the integrity of creation and sustain and renew the life of the earth. (Bonds of Affection-1984, ACC-6, p. 49; Mission in a Broken World-1990, ACC-8, p. 101)

In the next two sections, I present some of the knowledge and skills pertinent to clergy leadership which would have been required for effective missionary work in foreign lands.

#### *4.3.3.1.1 Selection and preparation of early missionaries*

William Carey, author of a seminal book on missionary work in 1792 and missionary to India, is attributed with an elaborate explanation of the requirements of missionary work to foreign lands. He explained that a missionary is a preacher of the Gospel, and is, therefore, a minister with the usual calling but operating in unfamiliar places. As to the anticipated hardships and dangers of such engagements, he stated that such were what anyone dedicated to the Christian ministry should be prepared for (Walls as cited in Phiri & Werner, 2013).

Carey, a self-educated person up to the level of degree qualification was, in many respects, a representative of many Protestant missionaries of the eighteenth and early nineteenth centuries. He notes in his book that:

Few (early missionaries) were highly educated according to the standards of the dominant culture in Britain. Often, they came from the lower classes of society – frequently they were artisans – but were prepared for immense intellectual labour at languages and theology. What drove them was their evangelical conviction. Most confessed to the sins of youth, and most commonly trifling pursuits, that is, wasting time (Walls as cited in Phiri & Werner, 2013, p. 10).

Based on cases of previous unsuccessful mission programmes, Carey had argued that “one reason for this was the inadequacy of preparation – mental, intellectual, and spiritual – of the enthusiastic and well-meaning young men who volunteered as missionaries” (Walls as cited

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natural world we inhabit” (1997, p. 51). This has critical implications on clergy leadership formation and training as will be discussed in this section.

in Phiri & Warner, 2013, p. 10). Such an observation was to be the basis of future considerations of what was to be used as criteria for selection and preparation of missionaries.

#### *4.3.3.1.2 The World Missionary Conference of Edinburg 1910*

The Edinburg Conference of 1910 on world missionary work is hailed as one of the landmark developments the Church has ever achieved, across denominations. Representatives from different church denominations met in Edinburg to deliberate on matters relating to missionary work, past, present and future. “Commission V” on the agenda was the matter relating to the need for intentional and thorough preparation of missionaries for work in foreign lands. Until then, as discussed in the previous section, the majority of missionaries were not adequately educated and trained for such work. In reviewing the status quo, “Edinburg 1910 came to a conclusion that the education of missionaries needed to be drastically improved in terms of (i) language studies; (ii) history of religions and sociology of mission territories, and; (iii) general principles of missionary work” (Werner, 2011, p. 92).

By intentionally crossing denominational lines in theological education and ministerial training, “Edinburgh 1910 promoted the establishment of centralised mission colleges that would be jointly supported by various denominations and mission agencies, in contrast to existing regional denominational mission seminaries” (Werner, 2011, p. 2). Such visionary and revolutionary ideas about theological education and training for ministry provided a future conceptualisation of ecumenical theological education and ministerial training that has been emphasised over the centuries to date.

Edinburgh 1910 therefore “bequeathed to the international movement an obligation to place theological education as a priority in any sober mission strategy (further observing that) the most important of all ends which missionary education ought to set itself to serve, is that of training those who are to be the spiritual leaders and teachers” (Kerr, 2009, p. 87).

#### *4.3.3.2 The Lambeth Conference phenomenon*

By the year 1867, the Anglican Church, through missionary work, had established 85 non-English dioceses across the world. This meant increased denominational clergy leadership and, in line with the spirit undergirding Anglicanism, the need to network across the diverse

contexts. Under the leadership of the Archbishop of Canterbury<sup>66</sup>, the first ever meeting of Anglican Church bishops was called for in September 1867 and 76 bishops attended. It was agreed at this meeting that the event would subsequently happen after every ten years (Chatfield, 1998).

Ever since, the event has provided the global clergy leadership of the Anglican Church with an opportunity to meet together in worship and fellowship while engaging on matters of common interest and concern such as the knowledge of God vis-à-vis the unfolding events in the world; practice issues which include the development of books of common prayer; doctrinal and pastoral responses relating to polygamy, racial discrimination; ordination of women; the environment and climate change; human sexuality; human trafficking and other socio-economic or political concerns of the day (Sedgwick, 2014).

Where required, committees at Communion level have been set up to follow up with diligence on matters which would have been unanimously agreed at Lambeth as critical to the church and the world in general. For instance, a Listening Process on the issue of human sexuality was set in motion in 2006 when the matter had been discussed and considered critical at the Lambeth Conference of 1998 (Groves & Jones, 2014).

In these deliberations, dialogue is prioritised despite the diversity brought about by the global representation at the conference, thus affirming that “it is not incidental that the Anglican Communion describes itself as a communion. Its shared experience is one of fellowship” (Avis, 2007, p. 8).

Anglicanism therefore calls for and endeavours to nurture clergy leadership which embraces diversity; leaders who, where it entails debate, present their arguments openly and logically in line with collectively agreed criteria. At the same time, such clergy leadership also acknowledges the legitimacy and dignity that should be accorded to those who hold contrary views on issues of mutual contention (Avis, 2007).

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<sup>66</sup>“The Archbishop of Canterbury is commonly acknowledged as the spiritual head of the Anglican church and is often referred to as the *focus of unity*. This reflects the Church of England as the originating church and the Archbishop of Canterbury as the Primate of the Church of England. To be in the Anglican Communion is to be in communion with the Church of England and therefore to acknowledge the Archbishop of Canterbury as *primus inter pares*, literally *first among peers*, or in other words, *first among equals* – in this case first among the primates of the other Anglican churches” (Sedgwick, 2014, p. 55).

#### 4.3.3.3 *Theological Education for the Anglican Communion Grids*

The importance of theological education in the Anglican Communion was reiterated at a meeting of Archbishops in 2001 where a “working-party” to spearhead a process of designing a framework for theological education in the Communion was set up. The whole process was named *Theological Education for the Anglican Communion* (TEAC) ([http://www.anglicantheologicalreview.org/static/pdf/articles/scully\\_90.2.pdf](http://www.anglicantheologicalreview.org/static/pdf/articles/scully_90.2.pdf)).

To elaborate the essence of their mandate, the “working party”, after having done extensive research work and consultative engagements across the Communion, included in their report a list of symptoms reflecting illness in the life of the church:

- “a general lack of theological literacy – a challenge to spiritual life and mission in increasingly secular societies and a serious hindrance to Christians in telling the gospel story and making connections between faith and life;
- inadequate engagement with contemporary thinking, culture and society – a challenge of selecting and preparing a new generation to share Christ in a world of apparently competing faiths, secularism and post-modernism;
- some confusion about the particular callings of those involved in the Church’s public ministry – a challenge in particular of practising *diakonia* (service) in a range of ministries;
- inadequately or inappropriately trained priests – a challenge of relating theological and biblical understandings to practical situations in preaching, pastoral care, evangelism and ethics, and of refreshing theology and practice;
- inappropriate practice of the particular ministry of a bishop in changing contexts – a challenge of understanding the functions of missionary, teacher, encourager, team-leader, manager, pastor, disciplinarian, public figure, example and colleague;
- a weak or selective commitment to Christians (even of Anglicans) of other traditions and perspectives – a challenge of appreciating the positive ethos of Anglicanism and what it can contribute to and learn from others in the Christian way” (TEAC, *Report to the Archbishops’ Meeting*, 2005).

Ultimately, the “working-party” designed a tool that specifies what ordination candidates should have covered at all the phases of formation. The phases are: discernment phase before formal theological education, spiritual and ministerial formation; at diaconate level; and at priesthood level. Examples of specific expectations highlighted in the document are: “vocation and discernment” (how the person is able or unable to articulate own calling); “clarity about the nature of ministry” (how the person is able or unable to explain what

ordained ministry entails); “spirituality and faith; personality, character and integrity; relationships” (*TEAC Grids document*, 2006).

Rowan Williams, Archbishop of Canterbury (<http://www.anglicancommunion.org/ministry/theological/teac/docs/briefs.cfm#s2>) at the time, had written the following about TEAC:

I am convinced that we cannot be committed to the well-being of our common life and witness in the Anglican Communion without being committed to theological education and its appropriate delivery at all levels. It has become increasingly clear to me that theological education within the Anglican Communion is not as well-resourced or rooted as it needs to be and that a communion-wide initiative such as this is urgently required. One of my main priorities at this stage of my ministry as Archbishop of Canterbury is the reinvigoration of theological education and I greatly welcome the decision we took as Archbishops to set up this working group. I shall be taking a keen interest in the progress of TEAC and offer my prayers and support to those who will be carrying out its work.

Anglican Church provinces across the Communion have been encouraged to adopt the TEAC grids in line with their contextual needs in the area of theological education. For instance, the ACSA Training for Ministry consultation (TfM) of 2012 deliberated this call and came up with a resolution that encouraged dioceses in ACSA to implement the TEAC grids in their programmes so as to educate and train clergy for the Anglican Communion and not just their respective contexts. The understanding of ordination as a sacrament<sup>67</sup>, universally recognisable, was affirmed. As such, it was emphasised that ordination should not be defined by a particular context but by the needs of the whole Church of God (Written reflections based on the 2012 TfM consultation).

Annexure 4.3 is a presentation of some of the educational and training programmes and activities which were initiated and facilitated post Protestant Reformation period to meet the socio-political and religious needs emerging in England and other parts of the world where the Anglican Church had been established like Africa, Scotland and America (Chatfield, 1997; Greig, 1999; Chapman, 2006; Avis, 2007).

Hodge (1985) argues that an attempt to investigate the developments and patterns characteristic of theological education and clergy formation in the Anglican Church would demand attentiveness to the voices and inclinations of individual clergy leaders engaging

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<sup>67</sup>Sacrament – the Anglican Church understands sacraments as outward symbols or signs which signal or confirm an inwardly experienced relationship with God through Jesus Christ.

with the unique ministerial opportunities and challenges of each local contemporary context. For instance, decisions to establish many of the English theological colleges were based on reasons of churchmanship. Chapman (2004, p. 1) asserts that colleges concerned themselves with “the assimilation of an ethos, the ownership of a tradition, and the development of a way of life or pattern of being.” For instance, “St. Stephen’s House was founded in 1876 by Edward King and other members of the Tractarian Movement (Oxford Movement), training priests in the Anglo-Catholic tradition. In direct competition, Wycliffe Hall was established a year later as an evangelical college in response to growing ritualism in the Church of England” (Percy, 2013, p. 40).

In Cambridge,

similar tensions over churchmanship underpinned the establishment of Ridley Hall and Westcott House. Both were founded in 1881 out of a concern for the lack of adequate theological training for clergy. But quite what form that training should take was a matter of some considerable debate. Ridley was established by the same group of men as Wycliffe Hall in Oxford, to guard against ritualism and rationalism. This proved too narrow a brief for professors Lightfoot and Westcott who decided to take independent action. Westcott believed that Ridley Hall had adopted a vision ‘narrower than that of the National Church’, and so established Westcott House on a much broader basis in the same year. There were those who were concerned with reconciliation across the spectrum of churchmanship. In 1854, Bishop John Williams of Connecticut founded Berkley Divinity School with the aim of bringing together students from the full breadth of Anglicanism to live, worship and minister alongside each other. In doing so, he hoped to contribute to the healing of divisions within the church. (Percy, 2013, pp. 40-41)

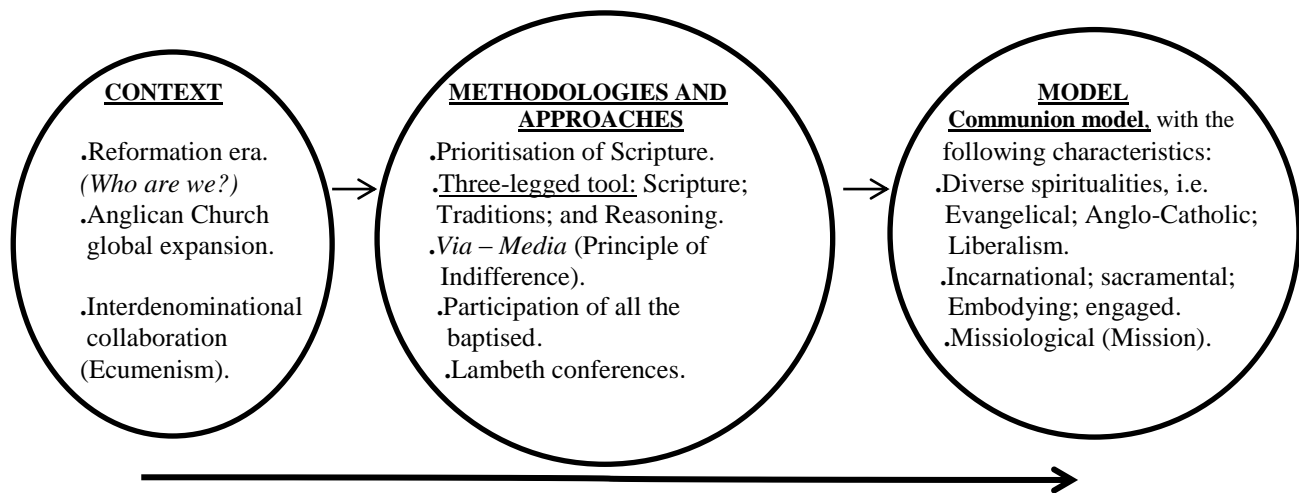
These developments illustrate the contrasting perspectives which have characterised the whole process of conceptualising, designing and facilitation of theological education and training programmes in the life and work of the Anglican Church<sup>68</sup>. At the core of these oppositional developments were issues relating to the appropriate nature of training needed at a particular point, in particular, the need for a “proper balance between contemporary academic research and spiritual formation (which were) instrumental in defining the vision and ethos of the emerging colleges” (Percy, 2013, p. 40).

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<sup>68</sup>“Tensions between liberal, conservative, progressive and traditional worldviews continue to exist (lack of agreed expectations for ministry). The strength of new outlooks on theological education is that they now tend to affirm the distinctiveness of specific geographical and cultural contexts, whilst maintaining some sense of shared purpose across the Communion. Potentially therefore, theological education has the capacity to be something of a unifying force within Anglicanism. However, agreement about the actual shape and content of the curriculum remains elusive” (Percy, 2013, pp. 43-44).

#### 4.3.3.4 Emerging Anglican Communion clergy leadership formation model

In view of what was discussed under 4.3 above, I present below an emerging model for the facilitation of clergy leadership formation in the Anglican Communion post Protestant Reformation:



*Figure 4.2: Illustration of an emerging Anglican Communion clergy leadership formation model*

The diagram above is a summarised response to the two questions which were raised in Section 4.3.1 which help to put into perspective the focus of Section 4.3. The two questions raised were:

- Who is the Anglican Church post Protestant Reformation? (What is Anglicanism?)
- What kind of clergy leadership was required in the changing contexts of the church?

As emphasised in Section 4.2 where a similar framework emerged, context is a fundamental determinant in the considerations and deliberations to establish relevant and effective clergy leadership formation models in the church, ACSA in particular. On the basis of this analysis, it is convincing to conclude that issues relating to the conceptualisation, organisation, planning and facilitation of clergy leadership programmes and activities are mostly influenced by local determinants even though the concept itself is a universal phenomenon (Nelson, 1999; Leithwood & Hallinger, 2002; Eacott, 2015).

In the next section, I do a historical review of the Anglican Church of Southern Africa from inception (1848) to date (2017), with the same objectives used for Section 4.2 and 4.3 of ascertaining the clergy leadership formation models which emerged in the discourse.

#### **4.4 ACSA CLERGY LEADERSHIP FORMATION IN HISTORICAL PERSPECTIVE**

##### **4.4.1 Institutional and territorial consolidation**

The inception and institutional expansion of the Church of the Province of Southern Africa (CPSA)<sup>69</sup> now ACSA, is synonymous with the ministry of Robert Gray, the first bishop of Cape Town, a British missionary who arrived in the Cape in February 1848 (De Gruchy, 1979; Villa-Vicencio, 1988; England & Paterson, 1989; Worsnip, 1991; Chidester, 1992; Hofmeyr & Pillay, 1994).

Gray “came out of a milieu of the expansion of European nations to the ends of the earth, an expansion in which Christianity and (British) civilisation went together” (Pato, 1998, p. 4).<sup>70</sup> Samuel Wilberforce, who became Bishop of Oxford in 1845, had echoed this understanding in 1838 by asserting that colonial or missionary bishops “were seen less as overseers of pre-existing churches, but more as pioneer evangelists following the example of the early apostles. The visible church in the person of the bishop was the first step rather than final task” (Chapman, 2006, p. 105).

These assertions reinforce a model of clergy leadership which emphasises that “the bishop is the focus of unity and faith, and is the chief teacher in the diocese, and seat of authority” (Russell as cited in England & Paterson, 1989, p. 95). However, as England in England and Paterson (1989) observes, the irony of this assertion was that Gray’s bishopric did not have outright autonomy as he was required to report to the Mother Church (Church of England) (Chapman, 2006). This requirement ceased to be when, in 1870, the Provincial Synod ruled that CPSA (ACSA) members would no longer appeal to external courts or committees on any

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<sup>69</sup>CPSA was officially instituted in 1870; 22 years after Robert Gray had disembarked at the Cape shores.

<sup>70</sup>“Gray’s understanding of the purpose of the Christian mission was largely influenced by his reading of Anthony Grant’s work. In the Bampton Lectures he gave to the University of Oxford in 1843, Grant placed great value on the missionary movement as an opportunity, not only for extending the Christian gospel outside England, but also for the expansion of the British Empire. He argued for a mission that met the needs of British colonialism and insisted on cooperation between colonisation and conversion. For Gray this understanding of mission meant that England was home and South Africa was merely a field for mission by missionaries from Europe. His primary task, and that of other missionaries, was to evangelise by converting Africans in Southern Africa” (Pato, 1998, p. 4).

matter of contention in the life and work of the church (England as cited in England & Paterson, 1989).

Whereas this study has an interest in investigating the clergy leadership formation models which emerged at different points in the life and work of the ACSA from its inception, what is emphasised above is that Robert Gray's preoccupation from the outset was "the development of the church's constitution and missionary expansion. On constitutional matters, major preoccupations were the growth of synodical government, the maintenance of unity with the Church of England and the exclusion of secular interference in doctrinal matters" (Suggit & Goedhals, 1998, p. 1). By 1934 CPSA (ACSA) had expanded in Southern Africa to include South Africa, Basutoland (Lesotho); Bechuanaland (Botswana); Southern Rhodesia (Zimbabwe); Lebombo (Mozambique); and Damaraland (Namibia) (Suggit & Goedhals, 1998, p. 1).<sup>71</sup>

Pato's reflections on Gray's initial emphasis in his leadership of CPSA (ACSA) articulate the overall goal of colonial churches:

When Gray founded the CPSA in 1870, the church Gray knew and which he represented was his home church, the Church of England. Thus, the CPSA was structured to be just like the church at *home*, England. The dominant features became those of the Church of England. This structure made it easier for missionaries from the Church of England to come and work in the CPSA for the latter was just like the church at *home*. (1998, p. 5)

In ecclesiastical language, Gray was the *eyes and the feet*<sup>72</sup> of the Church of England in CPSA (ACSA). However, in terms of hands on leadership and management of the mushrooming churches in Southern Africa, Gray needed clergy. A question of interest in relation to the goals of this study is how Gray educated and trained clergy for church leadership during this early stage of the life and work of CPSA (ACSA).

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<sup>71</sup>In 1934 Cecil Lewis and Gertrude Edwards edited a voluminous book entitled *Historical Records of the Church of Southern Africa* which "gave a thorough account of the constitutional development of the Province and a detailed history of each diocese" (Suggit & Goedhals, 1998, p. 1).

<sup>72</sup>This is a phrase based on a prayer attributed to Theresa of Avila, a prominent Spanish mystic, Roman Catholic Saint, Carmelite nun; born in 1515 and died in 1582. She is said to have prayed: "*Christ has no body now but yours. No hands, no feet on earth but yours. Yours are the eyes through which he looks compassion on this world. Yours are the feet with which he walks to do good. Yours are the hands through which he blesses all the world. Yours are the hands, yours are the feet, yours are the eyes, you are his body. Christ has no body now on earth but yours*" (<http://www.goodreads.com/quotes/66880>).

#### **4.4.2 Initial clergy leadership formation models in CPSA (ACSA)**

As discussed in the preceding section, the initial *status quo* in CPSA (ACSA) suggests that Gray relied on the Mother Church (Church of England) for supply of clergy for ministerial services in the rapidly expanding colonial church. Denis (2012) estimates that it was not until the first decades of the twentieth century that CPSA (ACSA) could run official clergy formation programmes. This suggests that, as was the situation in the Mother Church (Chadwick, 1954), the bulk of the clergy or missionaries who came to Southern Africa were not formally educated and trained for church leadership. Also, Gray himself, even though he was a graduate, was said not to have received formal theological education and ministerial formation (Denis, 2012, p. 518). Further, there is a school of thought which suggests that these British missionaries studied the Bible and learnt Greek on the ship en route to Africa (Southern Africa) under the tutelage of learned and experienced clergy (Hinchliff as cited in Dugmore & Duggan, 1964; Nuttall, 1977).<sup>73</sup>

In view of the above, Denis (2012) surmises that the approaches and methodologies which were used to prepare clergy for ministerial practice during the initial phases of the existence of CPSA (ACSA) set a framework from which a particular model emerged. The formal word used to refer to such a model of education and training is ‘informal’ which, when used in circumstances as those descriptive of the initial stages of CPSA (ACSA), could loosely be explained as “anything that works to meet the goal of the educational and training programme”. Denis (2012) is of the opinion that CPSA (ACSA) adopted such a model of clergy formation and training in the initial stages of the work and life of the province.

##### **4.4.2.1 Experiential model of clergy training in CPSA (ACSA)**

A study of the documented cases of ordination of black people (men) in the initial years of the life and work of CPSA (ACSA) shows that no formal theological education and ministerial training would have been offered to the candidates. Rather, the recipients would have been assistants of missionaries or clergy at local mission centres or churches. For instance, they could have assisted as translators, catechists, evangelists, lay readers, or lay

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<sup>73</sup>At the CPSA (ACSA) Provincial Synod of 1883 it was reported that “104 out of a total of 218 clergy had been ordained without apparently any specified and certified literary or theological qualification. Of the remainder, sixty-one were graduates, thirty four were theological students, mainly at St. Augustine’s College, Canterbury, and nineteen had been under theological tutors for at least a year. These statistics essentially concerned English-born clergy. Only twenty-nine clergy were born in South Africa, of whom 15 were said to be black” (*Report at the Provincial Synod of 1883*).

ministers. It was the responsibility of the incumbents (missionaries or clergy) to ensure that these people were informed of what was expected of them in their delegated responsibilities (Hinchliff, 1963).

In most cases, these people would have been teachers in a missionary centre or in the vicinities of a local church (Denis, 2012). As such, they would have been educated to a certain level of competency and skilled in certain ways, for example in teaching (Denis, 2012). We can surmise here that these people received their ministerial formation and training through hands-on involvement in the work of their principals (missionaries or clergy). Their education and training was thus experientially based, which is a model of clergy leadership formation distinct from the conventional *classroom* based clergy formation model. Where and when mentoring or coaching was offered under these circumstances, such would have been intended to augment what the recipients were already learning through their practical involvement in the work of their principals.

It is also important to mention that the manner and ways in which the experiential training would happen depended largely on the personal background, values and spiritual orientation of the missionaries or clergy concerned. For instance, where a training missionary was of the Anglo-Catholic orientation, those he trained or worked with and, in some instances, the community at large would be formed to embrace and live out that *brand* of Anglican Church spirituality.<sup>74</sup>

What this means is that ultimately, the diversity which characterises Anglicanism as discussed under Section 4.3 would be expressed and lived out in the same diocese or province as there would have been individual clergy who represented each of the spiritualities associated with the Anglican Church (refer to 4.3.2.1). Such a scenario generated a multiplicity of perspectives on clergy leadership which, inevitably, had implications on the conceptualisation, planning, management and facilitation of clergy leadership formation programmes and activities in CPSA (ACSA) (Pityana & Pato, 1993; Pato, 2001; Ndungane, 2002; also refer to Table 5.1, 5.3, 5.4).

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<sup>74</sup>A classical case to illustrate this opinion is that of Robert Gray. At his funeral, he was commended for living out a spirituality of hard work towards growing the CPSA (ACSA) particularly in terms of territorial expansion and in polity to the extent that it is strongly believed that as part of his legacy, CPSA (ACSA) “is a bastion of Anglo-Catholicism” (England as cited in England & Paterson, 1989, p. 21). Also refer to the discussion in Section 4.3.2.1.

Nonetheless, it is recorded that the first black priest in CPSA (ACSA) was Peter Masiza who was ordained to the priesthood in 1877, six years after his brother, Paul, had been ordained a deacon. Both were based in the diocese of St. John's (now diocese of Umtata, Eastern Cape). They had not received any formal theological education or ministerial training before their ordinations (Goedhals, 1989; Ngewu, 1994). About the same period, Mpengula Mbanda and William Ngcwensa, assistants to Henry Callaway, who himself later became bishop of St. John's Diocese, were also ordained to the diaconate (Burnett, 1953).

These important developments in CPSA (ACSA) came after a quarter of a century had elapsed from the year that Gray had arrived in the Cape. On the basis of the discussion above, it could be argued that the experiential model of clergy leadership formation suggests random and personalised approaches and methodologies. Considered otherwise, these were uncoordinated and potentially divisive approaches to clergy leadership formation and ministerial training. On the flipside, it could be argued as well that such efforts brought a glimpse of hope to the local Christian communities, particularly to those who felt called to serve in ordained ministries. It should be acknowledged though that, in the first instance, most of the missionaries and clergy of foreign origin sought and trained assistants mainly for convenience in their ministerial responsibilities and not necessarily as a commitment to educate and train the local people for ordained ministries (Burnett, 1953).

Arising from the above and in keeping with the goal of this study, one is interested to establish whether, under the circumstances of that time, Gray and his contemporaries thought about the possibilities of establishing formal clergy leadership formation and ministerial training programmes at all.

#### ***4.4.2.2 Sporadic training of black clergy in CPSA (ACSA)***

A review of the major sources of literature available on the life and work of CPSA (ACSA) from the time of Robert Gray indicates a bias in the narrative towards issues of church governance, administration, and mission, particularly the account of the cultural-religious challenges which were faced by missionaries and clergy in their endeavours to outreach local communities. It is from these accounts that one picks out issues related to clergy leadership formation in CPSA (ACSA) at the time.

However, certain developments in this area received fair coverage in literature in the form of diocesan reports, provincial circulars, individual documentaries by missionaries or clergy and academic articles.<sup>75</sup> I present here a few of those documented developments which help to affirm that despite the seemingly subdued attention on the subject in the major literature sources available, formal clergy leadership formation had always been regarded important by the leadership of CPSA (ACSA), uncoordinated though it might have been at the time.

To start with, in the year that Robert Gray died (1872), he is reported to have confided to his sister that what CPSA (ACSA) needed most, even though he had not been able to meet that need during his time as CPSA (ACSA) leader, was formalised theological education and ministerial training (Charles Norris Gray, 1876). In his personal capacity, Gray had tried to be practical with his convictions. Upon his arrival in the Cape, Gray had initiated a facility in his residential premises which would have availed opportunities for those in formation for ordained ministry to receive theological education and ministerial training. Gray's initial initiative did not last long for the suspected reason that it did not receive enough attention from him as he was more preoccupied with territorial expansion of the province and polity matters (Nuttall, 1977).

In the Diocese of Grahamstown, Bishop John Armstrong who, upon his arrival in his new diocese in 1853, initiated fundraising projects for the purpose of establishing a college for boys. In his vision, the prospective learners would subsequently be trained for ordained ministry. In 1855, St. Andrew's College was opened. Five years later, under the leadership of a new bishop, Henry Cotterill, an additional wing was added to St. Andrew's College for purposes of accommodating black children from the local communities. Informally, the new centre was named *Kaffir Institute* and formally, Mullins Institution after Robert Mullin, the clergy person who had been tasked with the responsibility of managing the school from 1864-1907 (Currey, 1955; Poland, 2008). In an unpublished PhD thesis, Gqubule (1978) states that even though the *Kaffir Institute* did not last long, it did produce learners who subsequently trained for priesthood.

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<sup>75</sup>Some of the major works on CPSA (ACSA) available but very thin on the subject of clergy formation and ministerial training include: *Bounty in Bondage*, (1989), edited by England & Paterson; *Change and Challenge*, (1998), edited by Suggit & Goedhals; *Compromise and Courage*, (2005), by Lee; *Anglicans against Apartheid*, (2008), by Clarke.

In 1858, Zonnebloem College was established in Cape Town for the education of the sons and daughters of chiefs. In an unpublished MA thesis on the history of Zonnebloem by Hodgson (1975), a link is made between this establishment and clergy leadership formation when three young black men attending school here and another from the *Kaffir Institute* were reported to have been sent to England in 1866 by Bishop Gray to spend time at St. Augustine's College (Canterbury). Unfortunately, their planned sojourn in England was short-lived as they could not endure the European climate. Despite that, it is reported that two of the four young men, Stephen Mnyakama and Josias Ntsiko, were later ordained deacons (Hodgson, 1975).

There are also existing records which link Zonnebloem College with the Synod of Bishops of 1869 where it is reported that the bishops agreed that "a more complete English and Theological education than (was) provided in the Mission Institutes of several dioceses" should be offered at Zonnebloem College "to candidates for Holy Orders and others" (*Minutes of proceedings of the Synod of Bishops of the Province of Cape Town, January 1869*). However, due to lack of funds, the agreed programme could not go ahead as had been planned (Hodgson, 1975).

The Provincial Synod of 1876 reconsidered the stalled proposal of the bishops and recommended rather the establishment of a theological college in each diocese and the formation of a provincial faculty which would function to monitor and examine the activities of the former with the particular objective of ensuring that the selection of candidates for theological education and ministerial formation were up to standard (*CPSA Constitution and Canons revised, amended, and confirmed by the Provincial synod, 1876*).

#### **4.4.3 Deliberations towards formal clergy leadership formation of blacks**

The proposal for the establishment of a central provincial theological college in CPSA (ACSA) remained an item on the provincial synod agenda. At the Provincial Synod of 1883, the proposal was further deliberated, with those championing it arguing that:

The attempt which [had] been made in several dioceses to establish Diocesan Theological Colleges or other similar machinery ... [had] been proven to be unsatisfactory. Such efforts [were] both too expensive and too feeble for the purpose. The maintenance of a competent staff of Tutors [was] beyond the power of any single diocese, and the small and fluctuating number of candidates therein, as well as the difficulty of insisting on residence for a sufficient time, [made] such

attempts difficult to succeed (*Resolutions passed by the Provincial Synod of 1883, Cape Town*).

In these deliberations, it turned out that those who were championing the proposal had in mind an exclusively white theological college. This contradicted the general spirit and vision with which this matter had been deliberated at previous provincial forums (Denis, 2012). The result of such a situation was the decision reached in 1891 to establish a white only residential college in Grahamstown where Webb, formerly with the diocese of Bloemfontein, had relocated to as the next diocesan bishop (Lewis & Edwards, 1934).

Further, as part of the deliberations to formalise and standardise clergy leadership formation in CPSA (ACSA), the Provincial Synod of 1898 resolved to institute “the South African Faculty of Divinity, an examining body awarding diplomas in theology and providing a form of graduation ceremony ... (which) consisted of the Archbishop, the bishops and all other doctors and bachelors in the Province (CPSA)” (Denis, 2012). In other words, the faculty was intended to function as a qualifying authority for formally instituted theological colleges in CPSA (ACSA) (Lewis & Edwards, 1934).

In 1902, St. Paul’s College was opened as an all-white theological institution, *a status quo* which changed in the mid-1970s when the college opened its doors to coloured and black students as well (Lewis & Edwards, 1934; Gqubule, 1978; Hewitt, 1994).<sup>76</sup> Chronologically, this indicates that, dating from the year that Robert Gray disembarked in the Cape, it took about one hundred and twenty years for black people to be enrolled for formal theological education and ministerial formation in CPSA (ACSA).

#### **4.4.4 Formal diocesan clergy leadership formation schemes for blacks**

The decision to formalise clergy leadership formation for whites only in CPSA (ACSA) caused tensions and restlessness in church communities and amongst clergy. For instance, during a diocesan synod in the diocese of Johannesburg in 1941, a motion was moved to

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<sup>76</sup>While deliberations to establish formal theological education and ministerial training programmes were on-going in CPSA (ACSA), relationships with the Mother Church (Church of England) were also on-going. For instance, CPSA (ACSA) continued receiving clergy qualified through British theological institutions and also sending those who qualified (mainly white ordinands) to receive theological education and ministerial training at those institutions. In terms of structures, CPSA (ACSA) tried as much as possible to function under the shadow of the Mother Church. For instance, the idea of a Faculty of Divinity which was introduced locally in 1898 had been conceptualised, developed and included in the British theological education and ministerial training programmes the previous year (Denis, 2012). Also, when St. Paul was opened, the programme which was implemented in the early stages of the life and work of the college was an exact replica of the programme used in English colleges (Hewitt, 1994).

remove “all restrictions on the admission of non-European students to St. Paul’s” (Lee, 2005, p. 134). Even though the motion was defeated, it had expressed in strong terms the spirit of protest in some quarters of CPSA (ACSA) against segregation of any form in South Africa (Lewis & Edwards, 1934; Clarke, 2008).

The sporadic model of leadership formation of black clergy in CPSA (ACSA) as discussed in Section 4.4.2.2 was escalated to the level of formalised diocesan clergy leadership formation schemes whose main purpose was to open opportunities to black people to receive theological education and ministerial formation in an organised environment (Bentham as cited in Ngewu, 1994). I present next selected examples of these schemes as documented in available literature.

#### ***4.4.4.1 Clergy leadership formation colleges in Bloemfontein***

The recommendation to establish theological colleges in all dioceses reached at the Provincial Synod of 1876 was taken up with zeal and commitment by the bishop of Bloemfontein, Allan Becher Webb. In the same year of the Provincial Synod (1876), he facilitated the establishment of a college in his diocese by the name of St. Cyprian’s College, the first of its kind in CPSA (ACSA) (Hinchliff, 1963).<sup>77</sup> In terms of student intake demographics, St. Cyprian’s was open to enrol students from all races and cultural backgrounds provided they met the set admission requirements.

Financially, St. Cyprian’s College had the support of external funders who included the Society for the Promotion of Christian Knowledge (SPCK) (Lewis & Edwards, 1934). In addition, the college had the support of the Province through a resolution taken at the Provincial Synod of 1876 which “called on the wealthier members of the community to support financially the candidates for the ministry” (Denis, 2012, p. 521).

Lewis and Edwards (1934) state that by the end of 1879, nine priests who had been educated and trained at St. Cyprian’s College, all white, had been deployed in the diocese of

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<sup>77</sup>Previously, Allan Becher Webb had been the vice principal of Cuddesdon College, the theological institution which had been established by Samuel Wilberforce in Oxford (Denis, 2012). Lewis and Edwards (1934) hint on the impression that St. Cyprian’s College had the potential of being a central provincial theological education and ministerial training establishment, the possibility of which would have been favourable and acceptable to the materially less privileged dioceses. However, this possibility did not materialise, one reason given being that Bloemfontein was not central enough to effectively provide service to the whole province. Up until its closure, St. Cyprian had managed to enrol students from Bloemfontein only (Denis, 2012).

Bloemfontein. Unfortunately, with the departure of Bishop Webb in 1883, the establishment was closed down.

The other clergy leadership formation college associated with the diocese of Bloemfontein was the Society of the Sacred Mission (SSM) which had taken over the training centre at Modderpoort in 1902, offering courses in catechism among many other clergy formation activities. It is on record that in 1921 the SSM had facilitated the ordination of about six deacons (Firkins, 1932; Denis, 2012).

In 1955, because of the enforcement of the Bantu Education Policy which had been introduced by the Apartheid regime, the teacher training college and high school at Modderpoort were closed down. This also affected the operations of the SSM. In 1957, at the request of CPSA (ACSA) bishops, the SSM opened a pre-admission centre whose purpose was to screen black candidates. Although the facility had not been well received by the black students who cited discriminatory overtones in relation to the whole process, the SSM maintained that this was necessary for quality and up to standard training of future ACSA clergy leadership (Denis, 2012).

Currently based in Lesotho (Maseru), the SSM continues to contribute significantly to a number of ministerial and pastoral activities in CPSA (ACSA).

#### ***4.4.4.2 St. Bede's College, Umtata***

Bishop Henry Callaway, as alluded to in 4.4.2.1, was instrumental in setting up foundations for theological education and ministerial training opportunities for black people in the Eastern Cape (Umtata, Kaffraria). Towards his death, Callaway is reported to have avowed his commitment to establish a formal theological education and ministerial training college in Kaffraria, thus using his remaining power:

to raise a native ministry and for this purpose to establish such an institution at this place as shall ensure for the whole Kaffraria a more educated class of society and an efficient Christian ministry so that when we have passed from our labours, we may leave behind us a body of good and [loyal] men and well trained servants of Christ, our one Master, to take up our work and carry it on to the glory of God (Gibson as cited in Ngewu, 1994).

Callaway's vision materialised in 1898 when his successor, Bransby Key, officially opened St. Bede's College with as firm conviction as Callaway had, fully convinced that there would

come a time in the future when the white clergy would have to give way to the Native Church to stand on its own (Gibson as cited in Ngewu, 1994). By 1911, St. Bede's College had educated and trained nine priests and 14 deacons who all served in the diocese of St. John's (Gqubule, 1978).

The vision shared by bishops Callaway and Key about the importance of St. Bede's College in the diocese of St. John's and the CPSA (ACSA) at large almost collapsed when a new bishop, Joseph Watkin Williams, took leadership from 1901. Totally opposed to the understanding of his predecessors, he argued that the role of St. Bede's College was to educate and train black clergy as future assistants to white clergy and not leadership responsibilities (Ngewu, 1994). It was observed as well that educational standards at St. Bede's College deteriorated during Bishop Williams' episcopate and his successors as emphasis was put more on "devotional training and pastoralia" (Goodall & Nielsen as cited in Denis, 2012).

The situation at St. Bede's College was restored when James Schuster was appointed principal of the college from 1949-1955. A significant change which he made to the operations of the college was to appoint an assist, Michael Carmichael, who was to succeed him as principal after he had been elected bishop for the diocese (Ngewu, 1994).

Thereafter, St. Bede's College progressed in leaps and bounds in a context of political polarisation. For instance, when a black principal was appointed in 1975, "the following year the college had an unprecedented thirty-seven students (Hewitt as cited in Suggit & Goedhals, 1998, p. 118). Ngewu (1994) attributes the development to the political independence of the Transkei in 1976 particularly noting that "the region of Transkei roughly coincided with the geographic region of the diocese of St. John at the time ... it became possible for students to come to St. Bede's from as far as Botswana, Malawi, Rhodesia, Swaziland and Lesotho" (Hewitt as cited in Suggit & Goedhals, 1998, p. 118).

Another period of highlight in the history of St. Bede's College was when Winston Ndungane was appointed principal in 1984-1986. He was attributed with bringing "a broadness of education and an international mind to the college" (Hewitt as cited in Suggit & Goedhals, 1998, p. 118). In particular, Ndungane is said to have diversified the formation programme of the college industrial mission and clinical pastoral ministry. Also, Ndungane introduced an

exchange programme for students which gave opportunities to students to travel across national and continental borders (Ngewu, 1994).

In Section 4.4.7 I discuss what eventually became of St. Bede's College in 1992 in view of the socio-political developments which were happening in South Africa at the time.

#### ***4.4.4.3 St. Peter's College, Rosettenville***

What came to be known as St. Peter's College, Rosettenville, has its origins in two other Anglican Church related Christian organisations which existed before it. These were the Community of the Resurrection (CR) and St. Cuthbert College. CR was "an Anglican religious community for men founded in England in 1892" (Denis, 2012, p. 524). St. Cuthbert College had been established in the diocese of Pretoria around 1894 with a clergy formation programme that emphasised "habits of prayer, and study, and work" (Victor as cited in Gqubule, 1978, p. 192). A visiting British Director of Foreign Missions, Edwin Farmer, had the following to say in his report about the students whom he had interacted with at St. Cuthbert's College:

These men were very capable missionaries, even though they were uninstructed and laymen. There can be no doubt that the very best missionary must be the properly trained native and the end of our work must be a native ministry. But to ordain natives without their being properly trained would be fatal to the spiritual life of the Church (Victor as cited in Gqubule, 1978, p. 192).

The bishop of Pretoria had responded to Farmer's report by asking CR to come and run St. Cuthbert's College. Unfortunately, war broke out and the college was closed down. In 1903, it was reopened under the new name of St. Peter's College, Doornfontein, under the leadership of CR. The first priest to come through the college was ordained in 1910 (Gqubule, 1978; Ndungane as cited in Suggit & Goedhals, 1998).

Due to limited space, the college was moved to a spacious place in Rosettenville, south of Johannesburg. It was then that the College changed its name to St. Peter's College, Rosettenville (Denis, 2012). By the year 1920, St. Peter's College, Rosettenville, had trained for the diocese of Pretoria 32 black clergy, of whom 15 were priests. In addition, the college had also trained about one hundred and fifty catechists (Gqubule, 1978).

Alban Winter of CR wrote in 1962 that St. Peter's College, Rosettenville, was the best theological college in CPSA (ACSA) having produced such accomplished clergy as Alpheus Zulu, the first black Anglican Church bishop in CPSA (ACSA) (1961) and Desmond Tutu,<sup>78</sup> first black secretary-general of the South African Council of Churches (1978) and first Archbishop of Cape Town (1986) (Wilkinson as cited in Denis, 2012).

Renowned for its monastic ethos, St. Peter's College, Rosettenville, was described by Wilkinson as follows,

Students were expected to attend Prime at 6:55 am, Mass, mid-day meditation, Evensong and Compline. No smoking was permitted before 10:30 am. Only English was spoken in the mornings. Basic education in reading, writing, arithmetic and drill preceded what sounds to have been a highly academic ordination syllabus: Bible, early church history, Prayer Book, pastoral theology, the Constitution and Canons of the Church of the Province, doctrine, the three creeds and Thirty-Nine Articles. Some services were conducted by the students in their own languages. On Sunday's students shared in the evangelistic work in the mine compounds. They paid for part of their keep by housework, printing and work in the bookshop (1992, p. 211).

In Section 4.4.6 I will discuss what became of St. Peter's College, Rosettenville, in view of the socio-political upheavals in South Africa at the time.

#### ***4.4.4.4 St. Matthew's College, Grahamstown***

In 1875, John Espin was appointed as a theological tutor for catechists and teachers in the diocese of Grahamstown. Periodically, he examined the candidates to ascertain their levels of understanding of the bible and the Book of Common Prayer. Candidates would be considered for ordination on the basis of their performances in these examinations. In 1881, Espin reported to the bishop that he had a total of nine ordinands studying under his care: six whites and three blacks (Denis, 2012).

Nathaniel James Merriman, bishop of Grahamstown at the time, secured funds for the black candidates to relocate to Mullins Institution (see Section 4.4.2.2) (Lewis & Edwards, 1934). "Later on, a school for the training of clergy and catechists opened at St. Matthew's College in Keiskammahoek in 1904 as part of a teacher training school founded in 1895" (Denis,

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<sup>78</sup>Archbishop Desmond Tutu's auto biographer Allen had the following to say about the impact that St. Peter's College, Rosettenville, had on Archbishop Tutu: "it is in Desmond Tutu's spirituality that the legacy of St. Peter's and the Community of the Resurrection can principally be seen. The regimen of spiritual practice that the CR fathers modelled became central to his daily life and ministry. His spirituality is prayerful, Gospel-centred, prophetic, disciplined and catholic minded" (as cited in Lewis, 2007, p. 29).

2012, p. 526). The school closed in 1935 with transference of its remaining two students to St. Bede's College.

#### ***4.4.4.5 Colleges run in the dioceses of Natal and Zululand***

Associated with dioceses of Natal and Zululand was St. Alban's College which was opened in Pietermaritzburg in 1882 as a school for African boys. It closed down before being converted into a theological college in 1898 (Burnett, 1953). In addition to theological education, the college also provided "practical education in areas such as agriculture, fencing and building" (Denis, 2012, 525). In 1923 St. Alban's college was relocated to Zululand, Isandlwana, where another college, St. Augustine's had been in operation since the 1880s, training catechists and evangelists (Gqubule, 1978).

In 1933, having been financially boosted by "a bequest left by an African layman" (Denis, 2012), the college operated as a joint theological school between the dioceses of Natal and Zululand with a new name, St. Vincent's College. The college could have closed down before or in 1938. In 1938, the remaining ordinands for the diocese of Zululand were transferred to St. Peter's College, Rosettenville (*Correspondence between bishops of Zululand and Johannesburg, 1937 in Denis, 2012*).

#### **4.4.5 A central training college for black clergy in CPSA (ACSA)**

The proposal for a central training college for black clergy was discussed at two consecutive provincial meetings: Provincial Missionary Conference held in 1906 and training for native ministry conference held in 1918. The first conference happened four years after a central training college for white clergy, St. Paul's College, had been opened in Grahamstown.

On the basis of questionnaire information which had been gathered prior to the first conference, it was observed and agreed that at that point in time CPSA (ACSA) was not yet ready for a central training college for black clergy (*Report of the Provincial Missionary Conference, 1906 in Denis, 2012*). The resolution was maintained at the second conference. Taking the matter forward, it was thought "advantageous that a theological College should be in proximity to a Normal School or Teacher's Training College" (*Official report of the seventh provincial missionary conference of the Church of the Province of South Africa, September 28<sup>th</sup> to October 4<sup>th</sup>, 1918, cited in Denis, 2012, p. 528*).

At an episcopal synod (involving bishops) of November 1933 following a Provincial Missionary Conference which had been held a few months before, consensus on the official recognition of “Regional Theological Colleges for African ordination candidates” was reached (*Report on the conference of the heads of theological colleges in CPSA, 1934, cited in Denis, 2012, p. 528*). Ultimately, the episcopal synod resolved that St. Peter’s College, Rosettenville, would be the provincial college “while recognising the right of any diocese (in effect the diocese of St. John’s with St. Bede’s College) to maintain an existing theological college” (*Appendix to minutes of St. Peter’s College Council, 16 August 1938, cited in Denis, 2012, p. 528*).

After all the deliberations on the matter had been done, in practical terms “two theological colleges in the Province (predominantly for blacks) were operating as provincial centres of clergy leadership formation; St. Peter’s for the north and St. Bede’s for the south” (Denis, 2012, p. 528).

#### **4.4.6 Clergy leadership formation amidst political animosity**

Beyond 1948, CPSA (ACSA) was challenged with the need to reconsider the obtaining models of clergy leadership formation, particularly in relation to black candidates. The political environment had deteriorated to an extent that, because of the stipulations of the Urban Areas Act which had been passed by the Apartheid government, St. Peter’s College, Rosettenville, had become a “black spot” in a white area and therefore had to be relocated. In addition, the Apartheid government orchestrated the destruction of all mission-based theological institutions in the country (Denis & Duncan, 2011; Denis, 2012).

In 1963, St. Peter’s College, Rosettenville, was relocated to Alice where it became a constituent of the Federal Theological Seminary (Fedsem) which comprised of three other colleges from other denominations namely: John Wesley (Methodist); St. Columbus (Presbyterian); and Adams United (Congregationalist) (Denis & Duncan, 2011; Denis, 2012).

The irony of these developments was that church leaders, across denominational boundaries, were challenged to come up with alternative ways of training clergy in the obtaining circumstances. In connection with this observation, Gqubule commented, “theological training had been forced into ecumenical patterns. This happened not because the churches

suddenly became ecumenically minded, but because outside forces began to operate on the churches” (as cited in Denis & Duncan, 2011, p. 41).

Fedsem also exposed the non-existence of collaboration between different churches in Southern Africa, particularly on issues related to theological education and ministerial training. This observation came up in a report which was written by the International Missionary Council (IMC) in the 1950s which in part read:

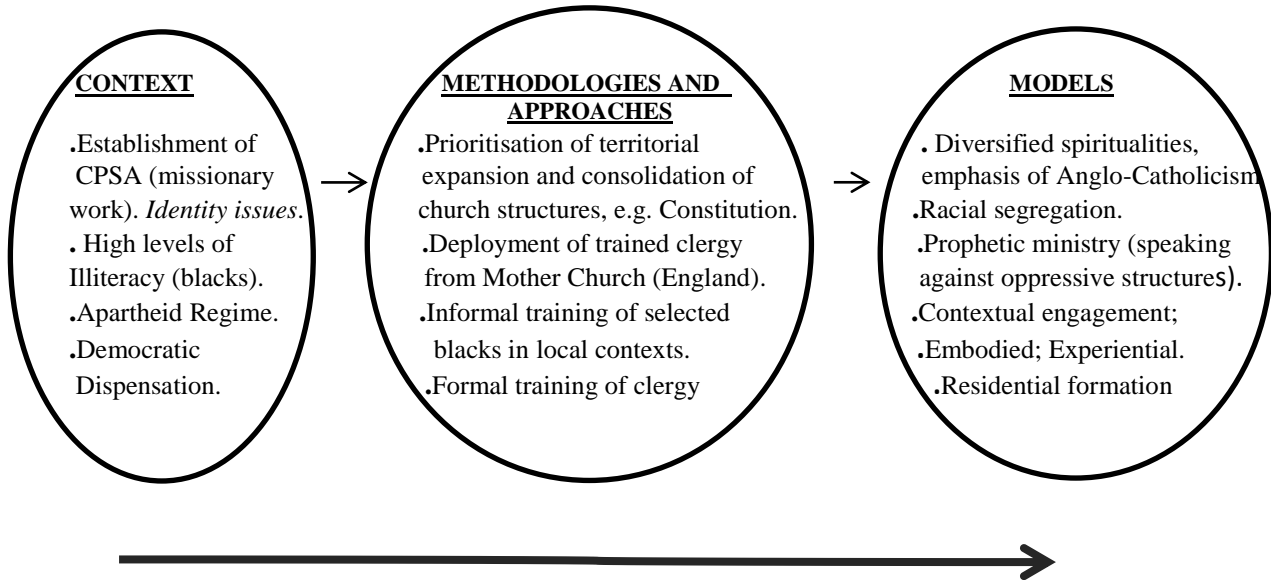
We were surprised to discover how slight is the contact between the theological colleges of the different areas and churches. Some college principals, even, were unaware of the existence of certain other colleges. Few theological teachers have ever met their colleagues in other institutions; rarely does there seem to have been a thorough and widely representative discussion of common problems, methods of work, literature resources and needs. (Goodall & Nielsen as cited in Denis, 2012, p. 532)

A new era of ecumenical collaboration and partnerships had been born. In 1968, the newly formed inter-denominational partnership “established the Church Unity Commission (CUC) with a view to uniting the churches within a common organic structure” (De Gruchy as cited in Denis, 2012, p. 532). However, with the end of Apartheid, this collaboration came to an end, with constituent denominations going back to the previous models which they had used to train their clergy. Fedsem was officially closed in October of 1993. By then CPSA had amalgamated St. Bede’s and St. Paul’s Colleges to form one college with the name of *College of the Transfiguration* in Grahamstown (Denis & Duncan, 2011).

#### **4.4.7 Amalgamation of St. Paul’s and St. Bede’s Colleges**

A motion at the Provincial Synod of 1989 called upon the Archbishop to set up a commission to investigate the future of theological education and ministerial formation in CPSA (ACSA) given the onset of a democratic dispensation in South Africa. After lengthy deliberations on how the matter would be handled to the satisfaction of all stakeholders involved, it was agreed that the two remaining provincial colleges, St. Bede’s and St. Paul’s Colleges, should be closed to give way to a new college. In 1991 the matter was finalised, with the intervention of the then Archbishop, Desmond Tutu. In 1993, the *College of the Transfiguration* was opened under the leadership of a black Rector, Revd Luke Lungile Pato (Suggit & Goedhals, 1998; Denis & Duncan, 2011; refer to Table 6.1 for details of the three phases which the College has gone through in terms of content of clergy leadership formation in line with the changing of higher education and training legislature in South Africa).

In view of Section 4.4, the diagram below (also used in previous sections in this chapter) illustrates an emerging framework for clergy leadership formation in CPSA (ACSA), from the inception of the denomination to date (see Figure 4.1; 4.2).



**Figure 4.3: Illustration of an emerging consolidated CPSA (ACSA) clergy leadership formation model.**

As explained in Section 4.2, 4.3 and 4.4, context has a strong bearing on the endeavour to investigate clergy leadership formation models in the Anglican Church, particularly CPSA (ACSA). In view of the research goals aligned to the second phase of the study as explained in Section 4.3.2, it can be argued that the context in which clergy leadership is practised informs of potential expansive learning opportunities for the participants involved in the practice. In the next section I discuss briefly the extent to which expansive learning theoretical imperatives (refer to 2.3.3.3.3; 3.4.4) can be used to explore collaborative clergy leadership formation practices in CPSA (ACSA).

#### **4.5 LINKING EMERGING ACSA CLERGY LEADERSHIP MODELS WITH EXPANSIVE LEARNING**

In Section 2.3.3.3 expansive learning is discussed as a methodological conceptual tool which can be used to “theorise and improve work processes” in organisations through involving organisational members in transforming activities (Engeström, interview with Glaveanu, 2012, p. 517). In this study, clergy leadership formation is understood as a church activity which is intended to “inform, form and transform” those who sense God’s calling to the ordained ministry (*ACSA Leadership Development document, 2012, p. 1*).

In the chapter, Christian identity has emerged as core to clergy leadership formation. In connection with the focus of this study (refer to 1.3), a question that comes to the fore in this regard is: who are Christian/clergy leaders? This searching question, at both personal and collective levels, could be considered as the main reason why context is a key factor in the effort to investigate clergy leadership formation models in the church, ACSA in particular. One way of responding to the question raised could be to say that Christian/clergy leaders express their identity (who they are) through what they do and say (Hough & Cobb, 1985; Ramey, 1991; Nelson, 1999; Ramey, 1991; Doohan, 2007).

The same would also apply for an organisation. It would not be the expectation that an organisation could conceptualise, plan, design or facilitate leadership formation programmes which contradict the shared understanding of the purpose (identity) of the organisation by its members (Ramey, 1991). In relation to Christian/clergy leadership formation, the conceptualisation of the whole process in terms of the design of activities and selection of facilitation approaches and methodologies would form the basis of an expression of a particular Christian identity, Anglicanism in the case of this study.

Further to the enquiry is a follow up question to the first, which is: how could Christian/clergy leaders improve their current understandings of their identity? This takes into account the history of the organisation, focusing particularly on the subject in question which, in this case, is clergy leadership formation. It is in line with this enquiry that the ultimate goal of this study is to explore how current practices in ACSA clergy leadership formation can be expanded through learning (see Chapter Five, Six).

Annexure 4.4 is a diagram that illustrates the basis of the conceptualisation, design and facilitation of clergy leadership formation in the Anglican Church, ACSA in particular.

## **4.6 CONCLUSION**

Central to the focus of this study is leadership rendered to the Anglican Church by a man or woman who would have, in the first instance, responded in faith to God's call to serve Him in His Church and, in line with the ecclesiastical rules and regulations of the Anglican Church, would have received requisite theological education, spiritual nurturing and ministerial training before ordination (Anglican Prayer Book, 1989; Chatfield, 1998; Pobee & Kudadgie, 1990; Willimon, 2000; ACSA Constitution and Canons, 2007, Act VI). The chapter has

emphasised that, first and foremost, those who become leaders in the church, the Anglican Church in particular, should be grounded in their Christian identity. The chapter discussed the different ways through which leadership formation for ordained ministry is facilitated in the Anglican Church, ACSA in particular; tracing the developments from the time when Jesus ascended to heaven as accounted in the New Testament of the Bible. In the chapters ahead, the implications of the diversity in approaches and methodologies discussed in this chapter will be explored further and analysed.

The next chapter presents and discusses contradictions surfaced in the two case studies used in the study in preparation for the expansive learning processes and activities in Chapter Six.

## CHAPTER FIVE: SURFACING CONTRADICTIONS IN ACSA CLERGY LEADERSHIP FORMATION PRACTICES

### 5.1 INTRODUCTION

This chapter surfaces contradictions in and between the activity systems which constitute the two case studies used in the study (see 3.2.3). The data analysis was in response to the research questions: *What learning in clergy leadership formation takes place among different participant groups in ACSA? What types of learning interactions occur amongst the key facilitators of clergy leadership formation in ACSA?* (see 1.5).

The chapter provides perspectives on the conceptualisation, planning, facilitation and management of clergy leadership formation programmes and activities in ACSA through an analysis of the data gathered in the research process (refer to 3.3 and 3.4). The data analysis presentation begins by providing brief diagrammatic descriptions of the activity systems involved in the study on the basis of contextual profiling findings (refer to 3.3.2.1), followed by an analysis of the contradictions within each activity system as well as between and among the activity systems. For each case study, an attempt was made to surface and categorise emerging contradictions according to primary, secondary, tertiary and quaternary, as explained in Section 2.3.3.3.1.

The chapter uses inductive analysis which allows data to speak for itself and abductive analysis which provides a theoretical lens through which a better understanding of the emerging data can be reached (see Table 2.1). In the process of surfacing contradictions, I bore in mind the understanding that contradictions manifest themselves through disturbances, ruptures, problems, breakdowns and clashes in routine institutional work practices (Engeström, 1999). The contradictions are surfaced and explicated in line with the “capitalist socioeconomic formulations” (Bonneau, 2013, p. 2) differentiating *exchange value* and *use value* (refer to 2.3.2).

On the understanding that contradictions ignite possibilities for change and development in work practices (Engeström, 1999; 2000; 2001), which may be understood as processes of institutional transformation, the chapter cultivates the ground for Chapter Six, whose preoccupation is the discussion of expansive learning possibilities in clergy leadership formation programmes and processes in ACSA.

## 5.2 DESCRIPTION OF ACTIVITY SYSTEMS IN THE CASE STUDY

I worked with three activity systems in the Cott case study which were the Cott management activity system, the Cott formation activity system, and the Cott experiential learning activity system. For the ACSA ministry and training case study, I worked with two activity systems which were the Advisory Board on Theological Education activity system and the Diocesan formators activity system (see 3.2.3). I present below the activity systems in the 2<sup>nd</sup> CHAT generation representation (refer to 2.3.3.2).

### 5.2.1 Cott management activity system

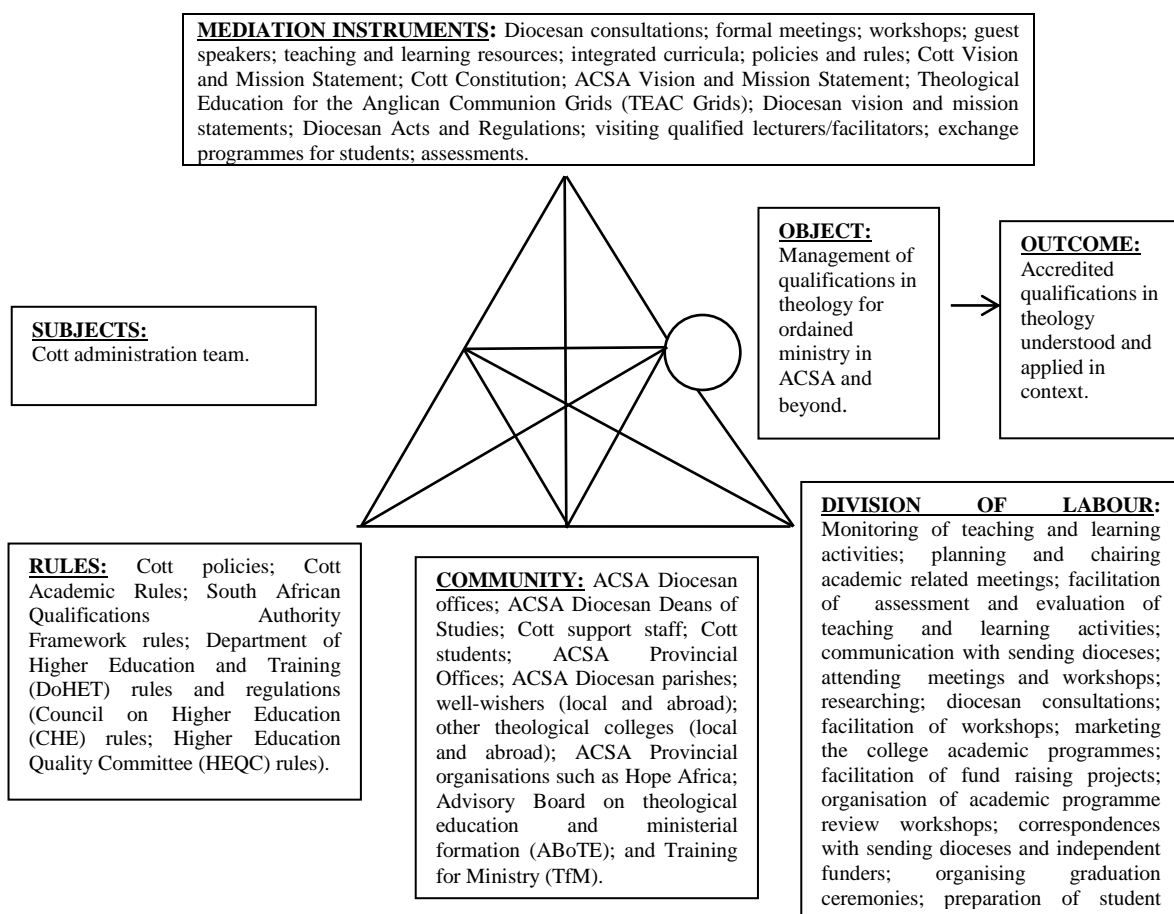
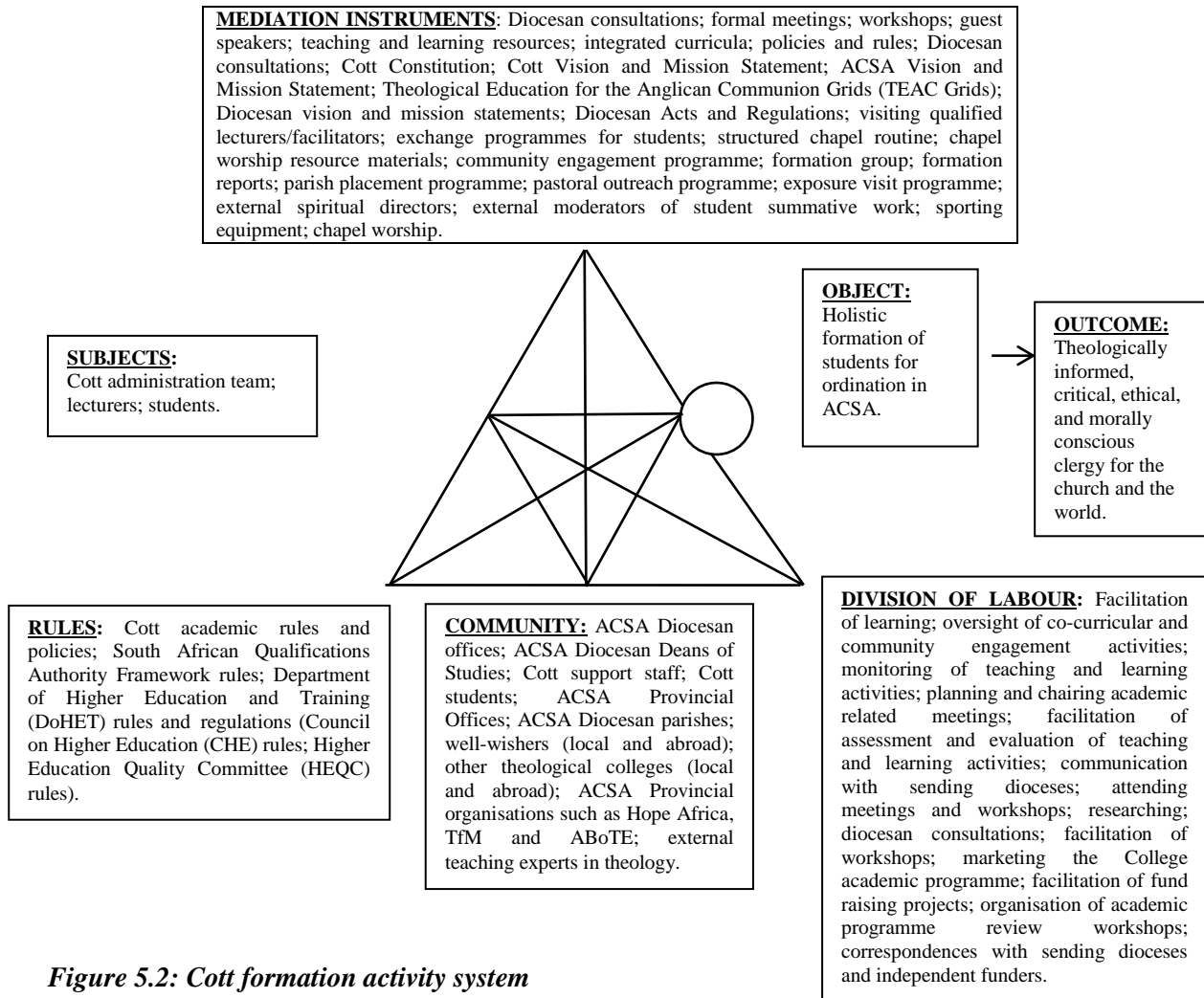


Figure 5.1: Cott management activity system

## 5.2.2 Cott formation activity system



**Figure 5.2: Cott formation activity system**



**Figure 5.3: Some aspects of Cott holistic formation programme**

### 5.2.3 Cott experiential learning activity system

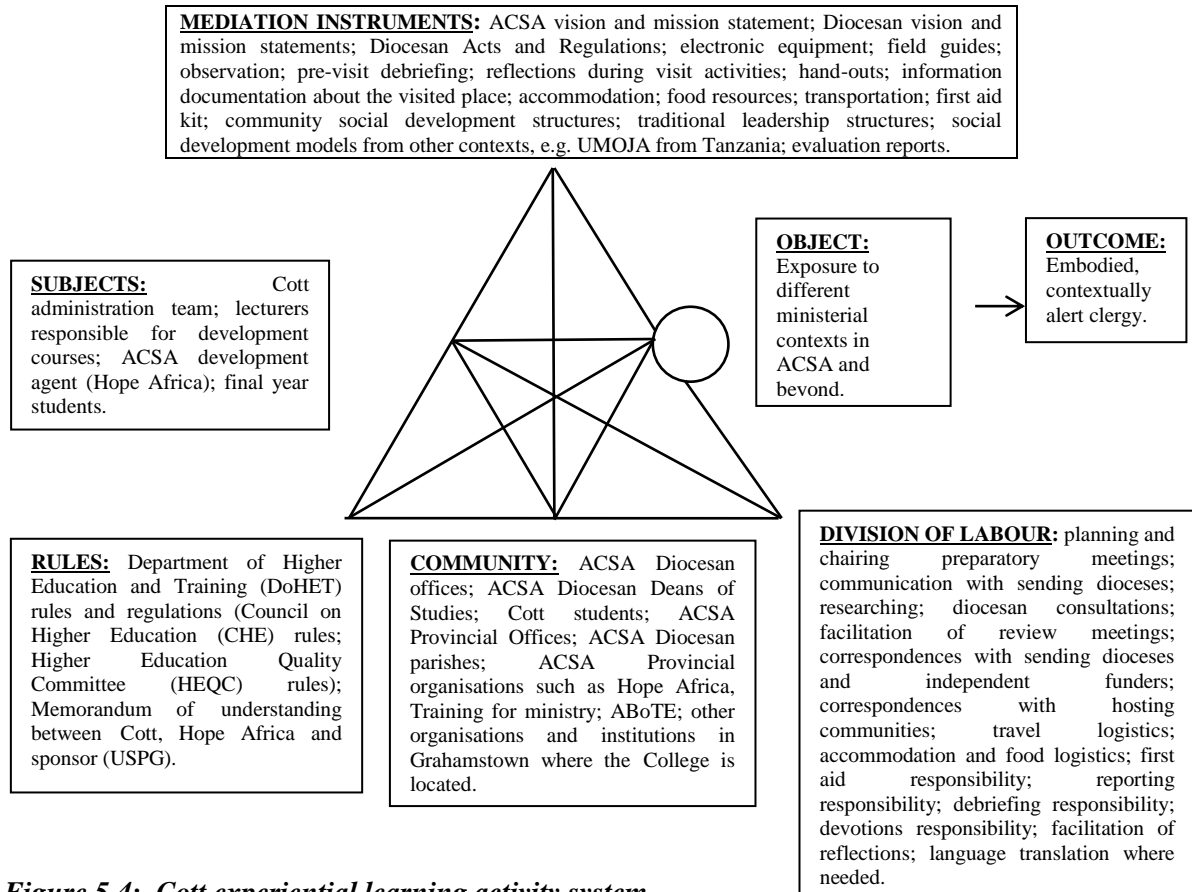
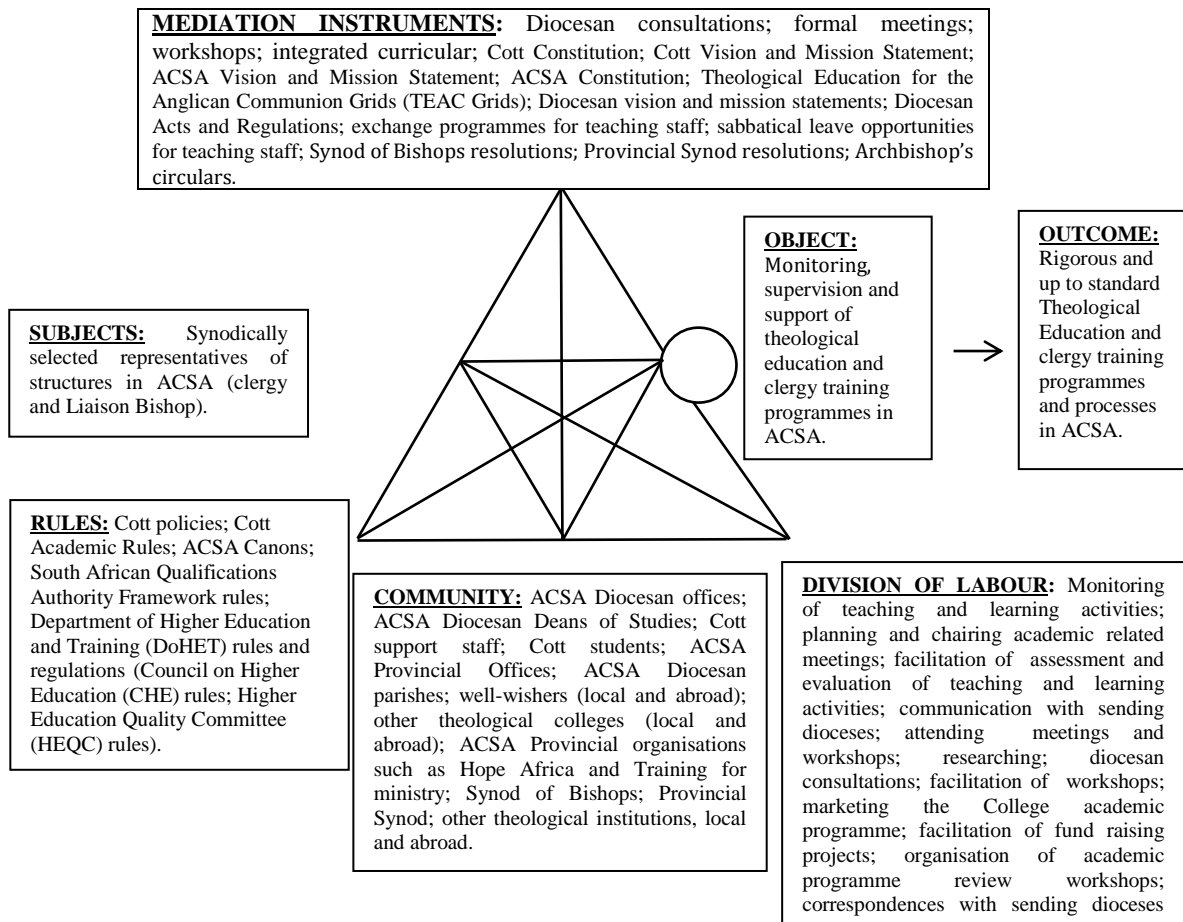


Figure 5.4: Cott experiential learning activity system



Figure 5.5: Some aspects of Cott experiential learning programme

## 5.2.4 Advisory board on theological education and ministerial formation activity system

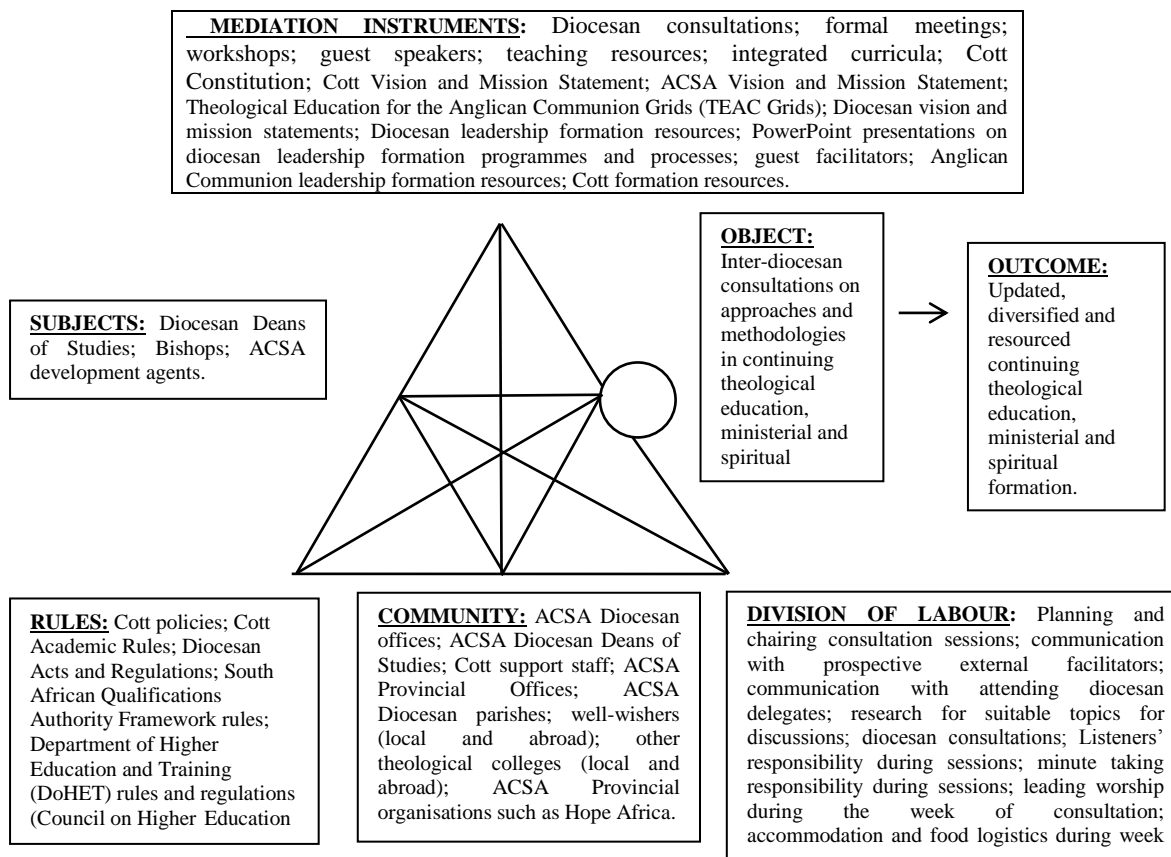


*Figure 5.6: Advisory board on theological education and ministerial formation activity system*



*Figure 5.7: Diocesan formators at one of their annual consultations*

## 5.2.5 Diocesan formators activity system



*Figure 5.8: Diocesan formators activity system*



*Figure 5.9: Conference on clergy leadership formation in ACSA involving Cott, diocesan formators and ABoTE members*

### **5.3 CONTRADICTIONS WITHIN ACSA MINISTRY AND TRAINING CASE STUDY**

As mentioned under 5.2, this case study was comprised of two activity systems (Diocesan formators and ABoTE activity systems) from which contradictions were surfaced and examined on the basis of the data generated during the research process. The analysis and discussion of primary and secondary contradictions of each activity system is illustrated by the CHAT 2<sup>nd</sup> generation activity system framework with the manifestations of contradictions located.

#### **5.3.1 Contradictions within the Diocesan formators activity system**

The Diocesan formators activity system consisted of representatives from the dioceses which make up ACSA and para-church organisations interested in clergy leadership formation such as Hope Africa.

##### ***5.3.1.1 Surfacing primary contradiction***

In Section 2.3.3.3.1, I explained that primary contradictions in the CHAT 2<sup>nd</sup> generation framework occur when activity participants encounter more than one value system attached to an element within an activity that brings about conflict (Engeström, 1999). In the interactions which I had with participants of the Diocesan formators activity system (see 3.4), a primary contradiction within the activity system was perceived in the conflictual responses to the research questions mentioned in Section 5.1 which I had received.

A key issue of participant concern and difference which came through the data was that ACSA, even though formally understood as one Anglican Church Province in Southern Africa (see 1.2), has diverse ministerial contexts. This acknowledgement linked up with the historical investigation of the foundations of Christian leadership formation processes in ACSA which was done in Chapter Four. It was evident that the diversity experienced had implications on the conceptualisation, planning, management and facilitation of clergy leadership formation programmes in the province (ACSA).

Further, the diverse understandings, concerns and debates about the *what*, *how* and *why* of clergy leadership formation processes and activities in ACSA, suggested that facilitators of clergy leadership formation had different orientations on the object subject. It can be concluded that the primary contradiction in this activity system is between diverse participant

understandings of clergy leadership formation practices and formally stipulated rules and guidelines concerning the phenomenon at a provincial (ACSA) level (refer to section 1.2.3.1).

In Table 5.1 below I present some of the distinct aspects of the activity system which the participants were concerned about or had diverse understandings about, paying particular attention to the implications of those concerns or understandings on the object of the activity system (see Figure 5.8). The participant statements were in response to the question: *What should be prioritised in clergy leadership formation programmes in ACSA?* which was a sub-question of the research question: *What learning in clergy leadership formation takes place among different participant groups in ACSA?*

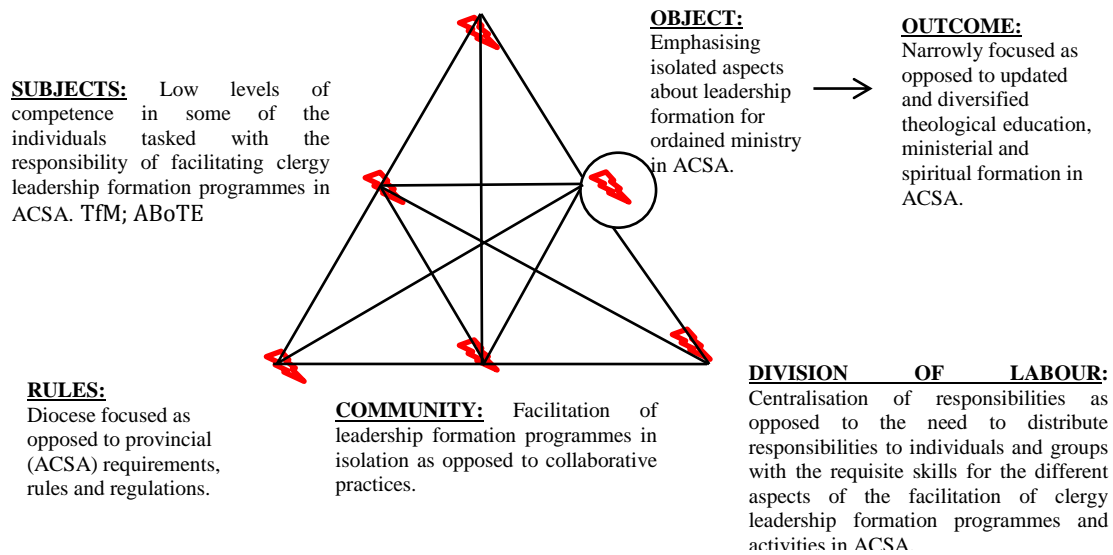
**Table 5.1: Manifestations of the primary contradiction within the elements of the Diocesan formators activity system**

Key indicators of primary contradiction	Evidence drawn from research findings	Manifestations of primary contradiction
<p>Conceptualisation of object of the activity system.</p>	<p><i>We keep restating our desire for spiritual and moral formation but we continue to be bedevilled by the status seeking “prince priest” model rather than emphasising contextually rooted models of clergy formation. Perhaps we need to design and frame our programmes more in the model of Theological Education by Extension. [Aint2]</i></p> <p><i>We need people formed as Christians first and Anglicans afterwards. We seem to miss the need for moral framework around priestly life and expectations – including integrity, self-giving, avoidance of theft and abuse of people, etc. [Aint7]</i></p> <p><i>We need church leadership that is deeply rooted in Anglicanism, placing emphasis on knowledge, practices and values. Each parish in ACSA should run an educational programme based on these three pillars, possibly starting with the Sunday school. This will ensure that the traditions of the denomination will be sustained. [Afg1]</i></p> <p><i>Clergy leadership formation programmes and activities in ACSA should aim to produce clergy who have the ability to articulate the ills affecting society beyond the bounds of the denomination. Clergy and bishops are too quiet these days. Gone are the days of Bishop Tutu and others of his time. In addition, clergy should be equipped more with skills that enable them to tap and use resources already available in the parishes. [Afg2]</i></p>	<p>Different understandings about what should be prioritised in clergy leadership formation programmes and activities in ACSA (object of the activity system). These different understandings have implications on the planning, facilitation and management of the clergy leadership formation programmes and activities in ACSA.</p>

<p><u>Planning of</u> programmes and activities in relation to the object of study.</p>	<p><i>Diversity is our hugest challenge. Different dioceses respond individually to the needs of their particular region with varied leadership practices, all influenced by the leadership style of the bishop. Consultations such as this (referring to Diocesan formators consultation of 2015) bring us together to share experiences and practices. [Aint5]</i></p> <p><i>Look, context is powerful. We get it wrong if we disregard contextual realities at the different levels and that is what bedevils our training programmes in the church at all levels. For instance, how has the international outcry arising from clergy abuse of church members and church resources impacted our training programmes? It says to me that we ought to be pro-active than re-active in our planning of clergy educational and training programmes. [Afg3]</i></p>	<p>Disagreement on what should be prioritized in clergy leadership formation programmes in the <i>community</i> element of the activity system.</p>
<p><u>Facilitation of</u> programmes and activities in relation to the object of study.</p>	<p><i>How would we best asses all the systems and mechanisms for the discernment of vocations in the various diocesan schemes that may not be formally approved provincially but operating, nonetheless? How does a bishop determine the level of competence required for ordination into the Anglican ministry of the qualifications offered by the various theological institutions around, especially the evangelical bible schools to which some Anglicans are presented for training and on the basis on which are then ordained? [Aint6]</i></p> <p><i>I must say that theological education has been an area of on-going failure during my time in the Synod of Bishops, and it has been very sad. We don't just seem to have been able to get it right, particularly the provincial (ACSA) academic requirements for ordination. We really have to get it right, knowing very well that it may take us a while to bring all concerned stakeholders together. [Afg3]</i></p> <p><i>Some of us are of the opinion that sole recognition of diocesan leadership training schemes would compromise residential training for ministry and yet with the relentless advancements in almost all the facets of life the world over, clergy adequately prepared for ministry would be required to meet the needs of all people across the boundaries of social constructs. [Afg4]</i></p>	<p>Disagreements on standards and requirements regarding clergy leadership programmes in ACSA which manifests in the <i>rules</i> element of the activity system.</p>

<p><u>Management</u> of programmes and activities in relation to object of study.</p>	<p><i>I have heard that ACSA has introduced a Leadership Development Programme for on-going education and training of clergy and others. Such a facility has been long overdue in ACSA. My experience is that in some cases clergy assigned the task of training curates (junior clergy) have not been adequately equipped themselves, particularly with the changes happening in the world in technology and thought trends, whether theology, economics, politics, etc. So, you see, this will help to avoid cases of the blind leading other blind people. There is a perpetuation of wrong models of leadership in some parts of ACSA ... I tell you. [Aint6]</i></p> <p><i>I can tell you that I have an experience of clergy in the responsibility of training rectors who have no interest in engagements in the ever evolving theological trends in relation to the developments happening every day in the world ... not to talk about both clergy and bishops who are contended with the basic qualification in theology (Diploma in theology) which they obtained because it was a requirement for ordination. [Aint3]</i></p>	<p>Different considerations of who should be tasked with the responsibility to facilitate clergy leadership formation programmes in ACSA which manifests in the subject element of the activity system.</p>
	<p><i>I attended a conference last week whose focus was a call to the Anglican Church in Africa to reclaim her property currently in private or state hands such as land and buildings. I was challenged to reflect on whether some dioceses in ACSA are fully utilising church properties ... for example those well-resourced parishes which, historically, have been understood as training parishes. It is only proper that such parishes should be led by clergy who have the knowledge and skills to develop junior clergy ... you get what I am saying? The emphasis should be training rectors and not training parishes ... buildings on their own do not do the work. [Aint3]</i></p> <p><i>Often, we blame it on lack of finances to plan training programmes in our parishes and dioceses. But capital takes different forms ... I am not sure we have been economic enough to fully utilise what we have before considering other options or fund-raising. [Afg2]</i></p>	<p>Failure to use resources creatively and innovatively in some parts of ACSA in the facilitation of clergy leadership formation and ministerial training programmes which manifests in the mediation instruments element of the activity system.</p>
	<p><i>St. Augustine, Bishop of Hippo (4th century) left us a legacy regarding the need to understand church responsibility as authority conferred on an individual and not power status as understood in the secular world. I am afraid to say that some of our diocesan leaders, including some bishops, ought to relinquish some of their powers so as to give opportunities to others to take full responsibility of assigned work such as that of organising theological education and training programmes in a diocese. It should not always be the Bishop or some other office bearing person, often taking the orders of the Bishop. [Afg4]</i></p> <p><i>You will be surprised to hear that the bulk of my work here as a facilitator of leadership formation, singlehandedly, is to translate from English to Portuguese ACSA documents sent to us to use in our programmes. You see, the assumption in ACSA is that everybody in the province is conversant with English and so no consideration is made of the language challenges that we have here. [Afg2]</i></p>	<p>Disproportionate distribution of responsibilities in the facilitation of clergy leadership formation programmes and activities in some dioceses of the province (ACSA) which manifests in the division of labour element of the activity system.</p>

**MEDIATION INSTRUMENTS:** Under-utilisation of church properties; training parish vs training rectors' perceptions of well-resourced parishes in dioceses in ACSA



**Figure 5.10: Illustration of manifestations of the primary contradiction within the elements of the Diocesan formators activity system (compare with Figure 5.8)**

### 5.3.1.2 Secondary contradictions

Engeström (2001; 2005b) explains that secondary contradictions are a result of the tension between two elements of the activity system, in some instances accumulating over a long period of time (refer to 2.3.3.3.1). Further, Engeström explains that secondary contradictions also occur when activity participants encounter a new element of an activity, and the process for assimilating the new element into the activity brings about conflict (Engeström, 1987). What this emphasises is that the aspects which make up Engeström's activity system framework should not be analysed and understood entirely as independent but as interrelated and intimately intertwined units (Virkkunen & Newnham, 2013). It is therefore plausible to surmise that an analysis of the revealed manifestations of the primary contradiction presented in the last section, which I turn to in the next paragraphs, could point to secondary contradictions within the activity system.

Figure 5.10 above indicates incompetence of some of the clergy leadership formation facilitators in ACSA as a manifestation of the primary contradiction in the subject domain of

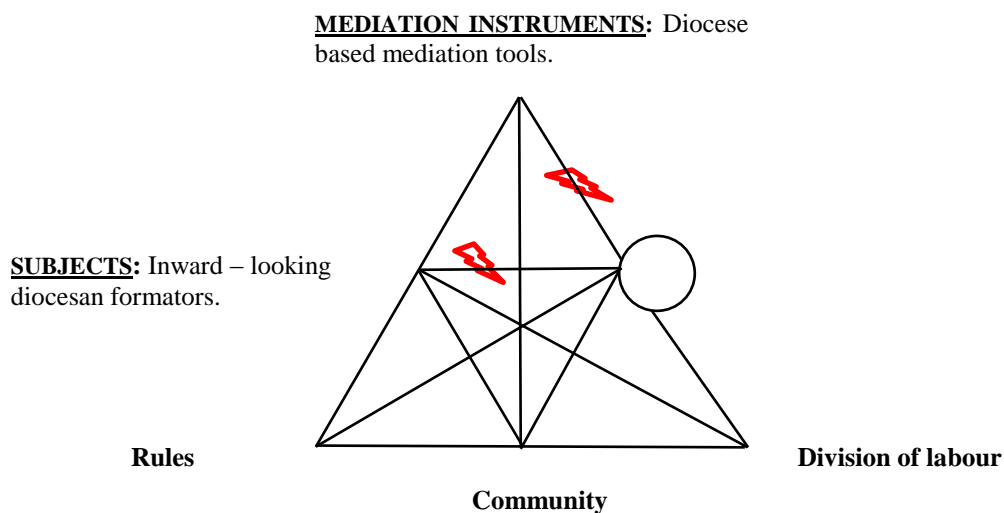
the activity system. Such a situation has negative implications on the planning and facilitation of clergy leadership formation programmes in ACSA particularly considering the *how* (mediation tools) and *why* (goal and outcome) aspects of the whole process. This implies that a lack of competent personnel in the area of clergy leadership formation in ACSA compromises quality service and subsequently failure to attain the goal of the activity (see Figure 5.8). In this case, therefore, the manifestation of the primary contradiction in the *subject* element negatively impacts the *mediation instruments* and *object* of the activity system as illustrated in Figure 5.10.

Regarding management of clergy leadership formation programmes in ACSA (see Table 5.1), the manifestations of the primary contradiction are in the *mediation instruments*, *rules*, *community* and *division of labour* elements of the activity system as indicated in Figure 5.10 above. These have negative impacts on the intended goal and outcome of the activity system. Whereas the intended goal and outcome of the activity system (Figure 5.8) emphasise the need to acknowledge and utilise diversity (multi-voicedness in CHAT framework) to reinforce and transform clergy leadership formation programmes and processes in ACSA, manifestations of the primary contradiction in the *rules* and *community* elements of the activity system imply an opposite goal as indicated in Figure 5.10. On the other hand, manifestations of the primary contradiction in the *mediation instruments* and the *division of labour* elements of the activity system emphasise the failure to fully utilise resources (human and physical) available in ACSA to enhance clergy leadership formation programmes which, subsequently, impacts negatively on the endeavours to attain the intended *goal* and *outcome* of the activity system. On the basis of the tensions discussed above, two secondary contradictions were revealed within the activity system:

i) Between subjects and the object of the activity system: As a result of the diversity which characterises ACSA on what clergy leadership formation entails, diocesan formators (subjects) do their work on the basis of their own understandings of what is valued and prioritised in their dioceses. What this suggests is that even at diocese level, successive formators in the work and life of the diocese may not necessarily facilitate clergy leadership formation programmes on a common understanding of what is valued and prioritised by their diocese. This implies prioritisation of personal preferences as opposed to complying with the officially recognised practices in the diocese and province (ACSA). What emerges from such practices is an inward-looking model of clergy leadership formation rather than an outward

and embracing model as suggested by the goal and outcome of the activity system in Figure 5.8.

ii) Between mediation instruments and the object of the activity system: In view of the contradiction discussed in (i) above, it would follow that diocesan clergy leadership formators have the discretion to use mediation tools suitable for their preferred clergy leadership formation models. In doing so, they limit their practices to personal preferences which, in many of such cases, are perceived inadequate. This would result in short-changing the impact intended in the goal and outcome of the activity system as stated in Figure 5.8. While CHAT acknowledges the reality of subjectivity on the part of those involved in an activity, formators in the case of this study, the framework places emphasis on the intended goal and outcome of the activity above everything else (refer to 2.3.2). Thus, in observance of the goal and outcome of the activity system as stated in Figure 5.8, formators would be expected to augment diocese-based mediation instruments with those used elsewhere in ACSA in their practices. For this to happen, it would require open-mindedness and willingness to learn on the part of the formators and the diocesan leadership at large (see Chapter Six). Below is an illustration of the secondary contradictions revealed in the activity system as discussed above.



*Figure 5.11: Illustration of secondary contradictions within the Diocesan formators activity system*

### 5.3.2 Contradictions within ABoTE activity system

As explained in Section 1.2.2 and indicated in Figure 5.6, ABoTE is guided by the ACSA Constitution and Canons which stipulate matters relating to clergy leadership formation in ACSA. In a nutshell, the expectation is that ABoTE should familiarise itself with on-going clergy leadership formation programmes across ACSA at any given time. Also, ABoTE, as the umbrella structure responsible for matters regarding clergy leadership formation in ACSA, is expected to collaborate with key structures with similar responsibility at a lower level in the province (ACSA) which include Cott and Diocesan formators activity systems (see 1.2.3). At a higher level of governance in ACSA, ABoTE is required to have representation at Synod of Bishops resolutions and Provincial Synods (see 1.2.2.).

The above explanation testifies to the huge role placed on ABoTE regarding clergy leadership formation programmes and activities in ACSA. However, as evidenced in the research participant views presented in Table 5.2, a key issue which emerged was the incompatibility of the role placed on the Board and practices of the Board at both collective and individual membership levels. Since ABoTE is a structure within ACSA’s clergy leadership formation framework or strategy, it follows that the roles placed on Board and individual members are formal requirements and expectations which go with the responsibility. This brings to the fore the interplay between “structure” and “agency” as propounded by critical realists (refer to 2.2.2.2). Drawing from this analysis, it can be concluded that the primary contradiction in the ABoTE activity system is incongruity between practice (“agency”) and structural requirements and expectations (“structure” placed on the board (ABoTE) and her individual members.

I present below manifestations of the primary contradiction within this activity system drawn from the data gathered during the research process.

#### 5.3.2.1 Manifestations of the primary contradiction

**Table 5.2: Manifestations of the primary contradiction within the elements of the ABoTE activity system**

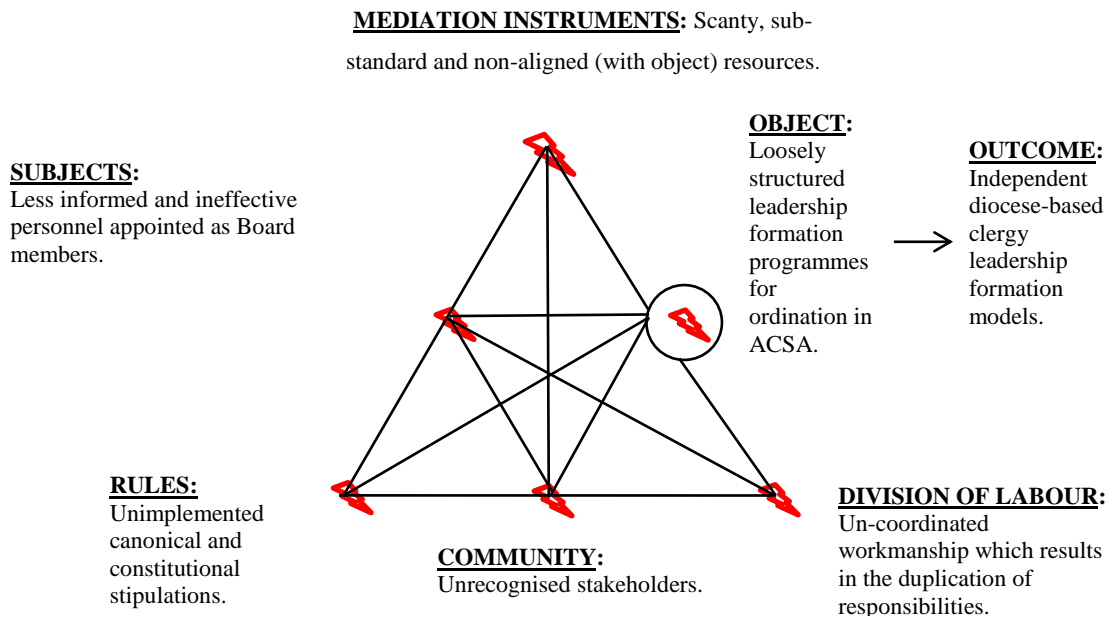
Participant views	Manifestations of the primary contradiction
<i>I am disappointed with the ACSA decision to allow dioceses to have independent training/formation schemes. Through</i>	The manifestation of the primary contradiction is located in the <i>object</i> of the activity system. In

<p><i>that, what is ACSA saying about formation of clergy? Why the decision to use schemes – it depends on who you ask. Where is ABoTE in all this? [Aint5]</i></p> <p><i>However, in practice, the Board does not get its teeth into issues which really concern the province in the area of clergy leadership formation (the mandate to form and inform men and women who feel called to ordained ministry). For instance, clergy wellness (stress; burnout; illness) is such a huge issue in the province but it is not discussed at this strategic level. [Aint3]</i></p> <p><i>It seems to me that ACSA formation models, approaches and methodologies are biased towards educating and training people for parish ministry rather than church ministries. Actually, you see, this is a misnomer and the possible reason why ACSA is thin in some aspects of her ministries. [Afg4]</i></p> <p><i>ABoTE should facilitate a mentoring programme for clergy towards transformational leadership. The concept ‘transformation’ ought to be problematised in view of scriptural injunctions, e.g. Romans 2:12. Perhaps the process should all start with the office of the bishop – inside out as opposed to the secular model of organisational change which premises on intervention from outside the organisation and is in essence a bottom up management strategy. [Aint3]</i></p>	<p>Figure 5.6 the <i>object</i> of the activity system is presented as <i>monitoring, supervision and support of theological education and clergy training programmes in ACSA</i> with an envisioned outcome stated as <i>rigorous and up to standard Theological Education and clergy training programmes and processes in ACSA</i>. The participant views here reveal that a host of other things are happening or not happening in contradiction to the <i>object</i> and envisioned <i>outcome</i> of the activity system. Figure 5.6 and 5.11 are a contrasting representation of the object of the activity system as understood in ACSA and as practised by members of ABoTE, respectively.</p>
<p><i>The Board (ABoTE) should enforce curriculum review processes to ensure relevance of training programmes in the province at any given time. The world is changing; the church should not be left behind. A template or ‘one size fits all’ approach would not work in ACSA. [Afg4]</i></p>	<p>The manifestation of the primary contradiction is located in two elements of the activity system which are the <i>mediation instruments</i> and the <i>object</i>. The former is more pronounced than the latter in the sense that, because the Board (ABoTE) does not enforce curriculum review processes in clergy leadership formation programmes in ACSA, the <i>object</i> of the activity system is negatively affected.</p>
<p><i>A ‘free range’ model of formation would threaten the integrity of the denomination with ‘adulteration’ as the likelihood of student reliance on or exposure to ‘anti-Anglicanism’ resources with little qualified guidance were high. In the context of residential formation, such occurrences would be monitored by personnel with requisite knowledge in the field of theology and Anglicanism. [Aint5]</i></p>	<p>The manifestation of the primary contradiction is located in three elements of the activity system namely the <i>object</i>, the <i>subject</i> and the <i>mediation instruments</i>. The attribution of a “free range” model to current facilitation processes and activities in clergy leadership formation in ACSA suggests that ABoTE is not in charge as mandated (refer to 1.2.3) which has implications on the people entrusted with the facilitation responsibility (<i>subjects</i>); the kind of <i>mediation instruments</i> employed; and ultimately the attainment of the <i>object</i> of the activity system.</p>
<p><i>Dioceses with training and formation schemes, some of which have become dysfunctional are: Saldanha Bay; Cape Town (Cornerstone); St. Mark the evangelist (internship); Johannesburg (Fellowship of Exploration); Highveld (School of Leadership). The question most of us ask is – are these schemes effective at all in preparing clergy for the Anglican Church? Is ABoTE on board in all instances? Who in these dioceses are assisting with facilitation of clergy leadership formation activities through these schemes? [Afg3]</i></p>	<p>The manifestation of the primary contradiction is located in two elements of the activity system namely <i>subject</i> and <i>mediation instruments</i>. Whereas it is the mandate of ABoTE to ensure that all forms of clergy leadership formation programmes and processes in ACSA meet the conditions and requirements stipulated in ACSA Canons and Constitution (see 1.6.3), observance of such would entail entrusting the facilitation of</p>

	clergy leadership formation responsibility to people adequately equipped with requisite knowledge, values and skills.
<p><i>ABoTE pondered how we might satisfy such a function should the Synod of Bishops require it of us. How would we best assess, not just the residential College of the Transfiguration, but also the systems and mechanisms for the discernment of vocations in the various diocesan schemes that may not be formally approved provincially but operating, nonetheless?</i></p> <p style="text-align: center;"><b>[Aint5]</b></p>	The manifestation of the primary contradiction is located in three elements of the activity system namely <i>community</i> , <i>rules</i> and <i>mediation instruments</i> . The statement implies that ABoTE has not functioned as mandated by ACSA Canons and Constitution; hence the acknowledged failure to account how clergy leadership formation programmes and processes in ACSA could be assessed, evaluated and improved.
<p><i>The Synod of Bishops also needs to appoint people to the board with intention and purpose. The Board needs people with a passion for theological education. It is not always the case that a person who has attained the highest qualification in a particular academic field is necessarily passionate about the field. Understandably, that seems to be the criteria which the Synod of Bishops uses to appoint individuals to this responsibility. My opinion is that this needs to be reconsidered.</i></p> <p style="text-align: center;"><b>[Afg4]</b></p>	The manifestation of the primary contradiction is located in the <i>subject</i> element of the activity system. The criteria that are currently used to appoint people as members of ABoTE are here interrogated. Implicitly, such an enquiry has implications on the <i>object</i> of the activity system. It would imply that recognition of the <i>object</i> of the activity system would be the basis for selection of people for membership in ABoTE and not necessarily on the basis of a high academic qualification.
<p><i>How does a Bishop determine the level of competence required for ordination into the Anglican ministry of the qualifications offered by other various theological institutions, especially the evangelical bible schools to which some Anglicans are presented for training and on the basis on which are then ordained?</i> <b>[Aint5]</b></p>	The manifestation of the primary contradiction is located in two elements of the activity system namely <i>rules</i> and <i>community</i> . The statement seems to suggest that it is public knowledge that many people in ACSA seeking acceptance for ordained ministry in a diocese do theological education with alternative institutions other than Cott. That being the practice, the non-existence of collaborative practices between ABoTE and independent theological institutions is a hindrance to the quest to attain the <i>object</i> of the activity system.
<p><i>To the best of my knowledge, the Advisory Board has never been called upon to exercise this function, but it remains an important part of the Church's quality assurance system.</i></p> <p style="text-align: center;"><b>[Aint3]</b></p> <p><i>Time has been spent on issues which ought to be handled by other provincial structures such as the Synod of Bishops. Other preoccupations such as allocation of bursaries are peripheral; they could be handled by other provincial structures and brought to ABoTE by way of reporting rather than for discussion.</i> <b>[Aint3]</b></p>	The manifestation of the primary contradiction is located in the <i>division of labour</i> element of the activity system. The two statements seem to suggest that even though ABoTE is canonically and constitutionally mandated with the responsibility of oversight in the area of clergy leadership formation programmes and processes in ACSA, in practical terms, other structures could be doing what ABoTE is mandated to do. On the other hand, ABoTE is also performing certain functions which are not necessarily under the purview of the board.
<p><i>There is openness between the Board (ABoTE) and the College (Cott). The Board receives reports on the College from the Rector and support in every way possible. However, the Board does not have the powers to go to the dioceses to compel them to send students to Cott. Nevertheless, relationships could be tightened so as to influence resolutions at Provincial Synod particularly on the issue of supporting</i></p>	The manifestation of the primary contradiction is located in the <i>rules</i> element of the activity system. The question that emerges from the statement is: if ABoTE is unable to perform the duties encapsulated in canonical and constitutional stipulations, what does that suggest about structural artefacts in ACSA particularly where it

<p><i>Cott. More creative collaboration between the Board and Cott could be explored.</i></p>	<p>pertains to clergy leadership formation? [Aint5]</p>
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Below are the surfaced manifestations of the primary contradiction within the elements of the ABoTE activity system on the CHAT 2<sup>nd</sup> generation framework:



*Figure 5.12: Illustration of manifestations of the primary contradiction within the elements of the ABoTE activity system.*

### 5.3.2.2 Secondary contradiction

Three key manifestations of contradiction (implicating both primary and secondary) emerged in the ABoTE activity system namely the role of ABoTE in ACSA, membership of ABoTE, and ABoTE collaborative practices with other activity systems involved in the facilitation of leadership formation for ordained ministry in ACSA.

The ambiguities surrounding the role of ABoTE as detailed in Table 5.2 and illustrated in Figure 5.12 have a negative impact on other critical issues that need to be in place in the endeavours towards effective facilitation of clergy leadership formation programmes in ACSA. Such issues include resource allocation (human and material) and design of

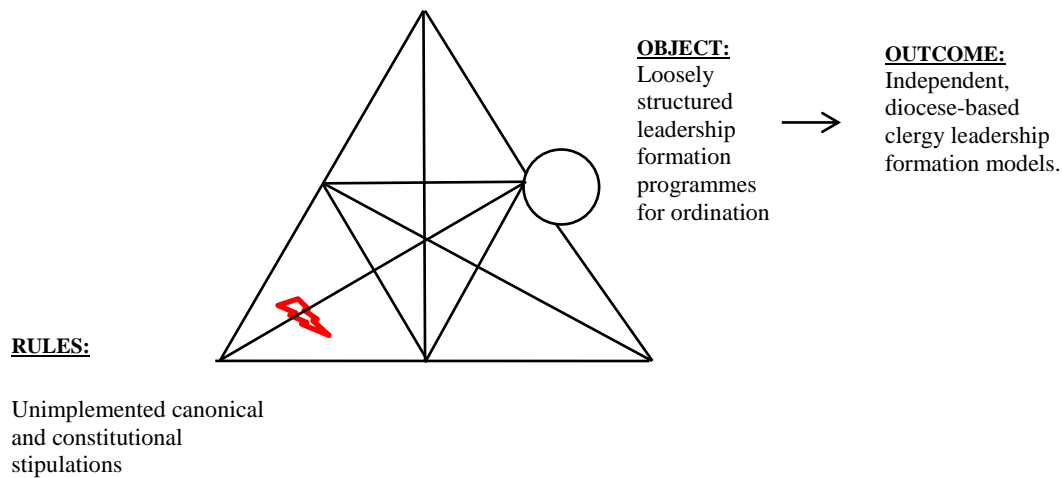
facilitation and learning materials; thus, resulting in tensions between the *object* of the activity system and two other elements, namely *mediation instruments* and *subject*.

The composition of ABoTE membership emerges in the data analysis particularly in relation to the consideration of what contribution each member could give toward fulfilment of the responsibilities of the Board as stipulated in the Canons and Constitution of ACSA (refer to 1.2.3; Figure 5.6). Random selection or appointment of members to the board on the basis of individual academic qualifications appears to be the practice in ACSA (see Table 5.2). In contrast, Board members would have been selected on the basis of individual qualifications and experience on matters relating to clergy leadership formation in ACSA. On the CHAT 2<sup>nd</sup> generation activity system framework, this results in tensions between *subject* and *object* elements, and *subject* and *mediation instruments* elements.

Another critical matter which is presented in Table 5.2 as a manifestation of the primary contradiction within the ABoTE activity system relates to ineffective collaborative practices between the Board and other structures and personnel involved in clergy leadership formation programmes in ACSA. ACSA Canons and Constitution stipulations (refer to 1.2.2) imply that such collaborative practices would enhance ABoTE's endeavours to realise the goal and outcome of the activity system as stated in Figure 5.6. On the CHAT 2<sup>nd</sup> generation activity system framework, this results in tensions between the *object* and *division of labour*; *object* and *community*; and *community* and *division of labour* elements. A quest for collaborative practices in the facilitation of clergy leadership formation programmes in ACSA is a key aspect of the purpose of this study. As such, the concept is critically explored in the study, particularly in Chapter Seven and Eight.

In view of the above analysis, taking into consideration as well the analysis done in Section 5.3.2.1, a secondary contradiction between the *rules* and *object* elements of the activity system was revealed. It would appear that the disregard of structural stipulations on clergy leadership formation in ACSA is a historical phenomenon descriptive and representative of the nature of the Anglican Church denomination and how it was introduced in the context of the study (refer to Chapter Four). Therefore, the commitment of the activity system (within ACSA) to work towards the goal and outcome as stated in Figure 5.6 should be understood as an effort to bring to a common focus all activity systems involved in clergy leadership formation in ACSA.

Figure 5.13 below illustrates the secondary contradiction in the ABoTE activity system (compare with Figure 5.6 and Table 5.2).



*Figure 5.13: Illustration of secondary contradiction surfaced within ABoTE activity system*

## 5.4 CONTRADICTIONS WITHIN THE COTT CASE STUDY

The Cott case study was comprised of three activity systems namely: The Cott formation activity system, Cott management activity system, and Cott experiential learning activity system (see Figure 4.1).

### 5.4.1 Contradictions within the Cott formation activity system

As discussed in Section 1.2.2, the Cott formation activity system was comprised of three strands namely: academic, spiritual and ministerial engagements. Inseparable from these three key aspects of the activity system are extra-curricular programmes which include sporting and community building activities within and beyond the boundaries of the College (Cott). These engagements are aimed at creating an enabling environment for holistic formation of students for ordained ministry in ACSA (clergy leadership). Accordingly, in Figure 5.2 the goal of the Cott formation activity system is presented as *holistic formation of students for ordination in ACSA* with an outcome stated as *theologically informed, critical, ethical, and morally conscious clergy for the church and the world*.

However, an analysis of contextual profiling research findings revealed a primary contradiction between irreconcilable participant perspectives about the concept *formation for ordination* in the Anglican Church and the perspective of the province (ACSA) as articulated by Archbishop Thabo Makgoba in Section 1.2.2. Again, as was observed in Section 5.3.2.2,

emerging issues from the analysis of the research findings have links with the history which informs of the basis of clergy leadership formation models in the Anglican Church, particularly ACSA (refer to Chapter Four).

#### **5.4.1.1 Manifestations of the primary contradiction**

Research findings suggested two key manifestations of the primary contradiction within the activity system which were: the quest to strike a balance between the three strands which comprised the activity system as explained above and conceptualisation of the *object* of the activity system. Extract 1 below which is based on a focus group discussion (Cfg3) which was conducted during the research process, illustrates these findings:

**Researcher:** What is your understanding of the core business of Cott? Why does the College exist?

**Interviewee 1:** *As stated in the College Vision and Mission statement, the purpose of Cott is to create an enabling environment for men and women who are called to the ordained ministry to do theological reflections. What theological reflections mean for me is that while the College is cognisant of the importance of such issues as liturgy; the environment; development and transformation programmes; parish ministry routine activities, and others, it is not our mandate to produce liturgists; environmentalists or development agents even though our discourses and the generality of our community activities pay heed to the importance of such. Having said this though, it is not everybody on the teaching staff who subscribes to this understanding as we ourselves have different formation orientations. Also, the authorities who send the ordinands to the College do not always agree with this understanding. We experience bishops, for instance, who emphasise that they send ordinands to the College so that they can be educated and trained for parish ministry. True to their understandings, once the concerned students finish at the College, they are given full responsibility to lead parishes. But the critical question is: does ordained ministry necessarily mean parish ministry?*

**Researcher:** You seem to imply that there is need to differentiate process and function or responsibility in the conceptualisation of the core business of the College. Please shed some more light on that?

**Interviewee 2:** *Ok. At the core of our mandate is the commitment to develop or grow critical thinkers in our students; people who, in any given situation, would be able to think outside the box. As such, it is not necessarily about the different forms of ministry that they (students) pursue after the College, but about the ability to do effective ministry in any given context at any given time. In this sense, therefore, Cott should be understood as a foundation for ordained ministry in the church and in the world at large. Skills are important but, in my opinion, we would not be worried too much if our product goes into a parish set up still needing assistance with the routine clergy activities. One gets to learn those with time through hands on involvement; continuing ministerial education; post ordination training, and other such programmes. What would be of great worry is a scenario where our product is at sixes and sevens regarding the requirement for clergy to respond to the world with a theologically informed mind-set. That is where our biggest concern is.*

**Researcher:** How does the Vision and Mission statement of the College translate into curriculum and facilitation of learning and training at the College?

**Interviewee 3:** *Our curriculum is geared towards meeting the expectations of our mandate. We have opportunities to review the curriculum to ensure that we remain aligned to the purpose of Cott in view of the developments happening in the church and the world at large. New members of staff who come on board also come with new insights which help to broaden our understanding of our mandate. It is not always an easy process to reconcile diverse perspectives of what should be added to or removed from the curriculum in place at any given time in the life and work of Cott. Our curriculum review meetings and workshops are empowering opportunities in so far as members of staff are challenged to reconsider their individual understandings of what should be in the Cott curriculum at any given time. Bishops also have an interest in what we teach and do not always agree with us on what should be prioritised in the curriculum.*

**Interviewee 4:** *We do facilitation of learning and training at Cott more than we lecture; with emphasis on contextualisation and critical engagement in class discussions, research engagements, written work, and so on. We are convinced that through such cognitive demands, all those who spend formation time at Cott gain 'something' of a stepping stone for their on-going formation. It needs to be said though that Cott cannot do 'everything' deemed necessary for formation for ordination in a space of three years (for the majority of the ordinands); two years or one year. What we do is what we are able to do which we think is of critical importance in our responsibility within the given time.*

**Researcher:** Do you encounter any challenges in your facilitation of formation at Cott?

**Interviewee 5:** *We struggle to keep a balance between the different activities which make up our formation programme, particularly between academic and spiritual formation activities. We are robust and thorough with our academic engagements which, inevitably, demand a huge time allocation more than any other activity. It comes as no surprise that Cott has generally been labelled as an academic hub in ACSA, a label which does not quite agree with the understandings of a number of key stakeholders of the role of a seminary in the work and life of the church. Other important engagements such as sporting activities which, under normal circumstances, would require formal programming are peripheral considerations at Cott. Ordinands are encouraged to find time as individuals beyond the formal activities of the college to engage in sporting disciplines. The real issue is lack of resources to manage two full academic programmes (soon to be three). Cott has not expanded much in terms of resources (human and infrastructure) upon increasing the number of qualifications on offer (Extract 1)*

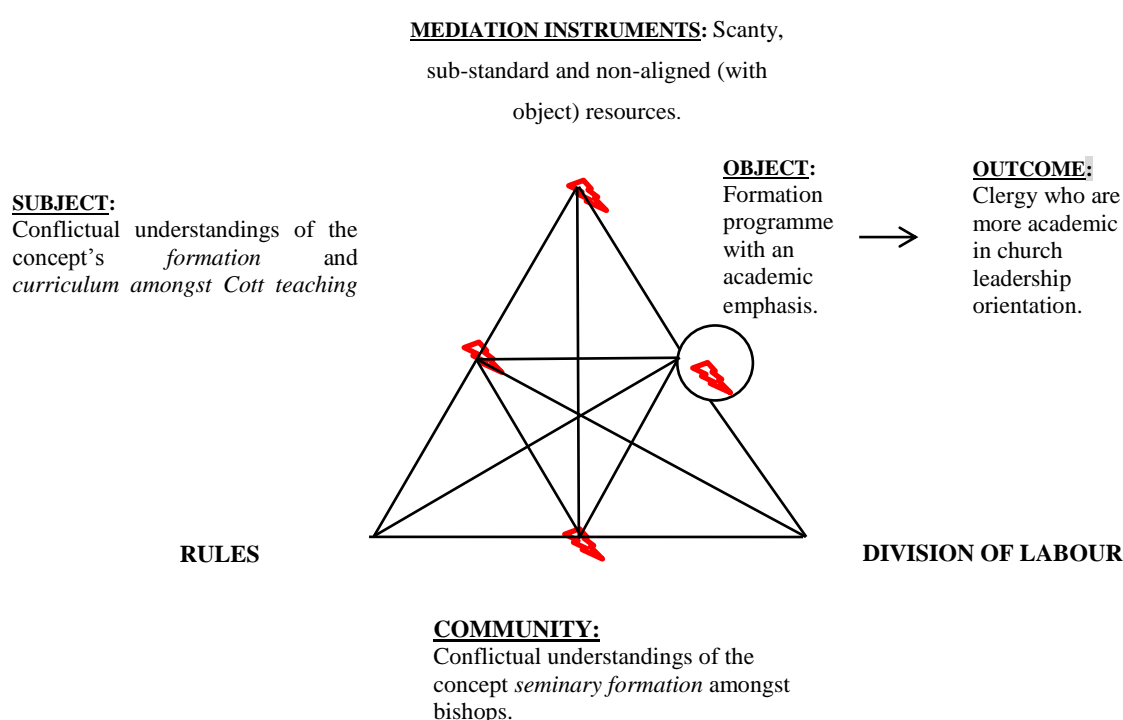
A detailed analysis of the interviewee statements gives more information about the identified two key manifestations of the primary contradiction within the activity system as below:

**Table 5.3: Manifestations of the primary contradiction within Cott formation activity system**

Focus concepts	Issues emerging from the interviewee statements	Manifestations of the primary contradiction within elements of the activity system
Conceptualisation of the object of the activity system	<p><b>Interviewee 1:</b> Cott lecturers have different formation orientations hence different understandings of the role and purpose of a seminary.</p> <ul style="list-style-type: none"> <li>• Formation at Cott is conceptualised more in terms of <i>cognitive processing</i> (academic) than <i>practice</i> (church ministry).</li> <li>• Formation is understood by some bishops as primarily intended for <i>preparing people for parish ministry</i>.</li> </ul>	<p>The manifestation of the primary contradiction is in three elements of the activity system namely <i>subject</i>, <i>object</i> and <i>community</i>. The subjects have discordant understandings of the concept's <i>formation</i> and <i>curriculum</i> due to their individual formation orientations. While this has the potential of enriching the Cott academic programme with creativity, innovation, originality, robustness and competitiveness, it has, in the case of Cott, the potential of stifling collegial and collaborative workmanship if not well managed.</p>
	<p><b>Interviewee 2:</b> Formation is understood at Cott in terms of <i>development of critical thinking skills</i> in students and less in terms of ministerial practice skills.</p> <ul style="list-style-type: none"> <li>• From a Cott perspective, it is the expectation that dioceses should train students how to lead parishes after their formation time at Cott which is not always guaranteed by some dioceses in ACSA (refer to 1.2.3).</li> </ul>	<p>A manifestation of the primary contradiction arises in the <i>object</i> of the activity system because of the difficulty experienced at Cott to balance academic (cognitive) and practical (practice) aspects of formation. A manifestation of the primary contradiction also arises in the <i>community</i> element of the activity system because of the discordant understandings in the bishops of the purpose and role of a seminary in the preparation of leaders for the church, ACSA in particular.</p>
	<p><b>Interviewee 3:</b> New teaching staff at Cott bring different understandings of curriculum which often leads to disagreements in curriculum review processes of what should be added to or removed from the curriculum offered.</p> <ul style="list-style-type: none"> <li>• Bishops also express different opinions about what should be prioritised in the Cott curriculum.</li> </ul>	
	<p><b>Interviewee 4:</b> Formation at Cott is understood as an <i>on-going process</i>. As such, Cott cannot do everything that is needed in the preparation of people for ordained ministry – in the broader sense and not just as an aspect of ministry such as parish ministry as argued by some of the bishops in ACSA.</p>	

<b>Balance</b>	<p><b>Interviewee 5:</b> Resources are a critical issue in the Cott formation programme, particularly time, infrastructure and human resources. As a result, extra-curricular activities such as sporting activities are less prioritised. This results in the difficulty to balance knowledge acquisition (cognitive) and application of the knowledge (practice) as assumed in the <i>object</i> of the activity system (see Figure 5.2).</p>	<p>Manifestation of the primary contradiction is located in the <i>mediation instruments</i> element of the activity system.</p>
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Figure 5.14 below illustrates the manifestations of the primary contradiction within the Cott formation activity system (compare with Figure 5.2):



**Figure 5.14: Illustration of manifestations of the primary contradiction within the elements of the Cott formation activity system**

### 5.4.1.2 Secondary contradictions

The multiple and incongruous understandings of the concepts “formation for ordained ministry” and “curriculum” between Cott staff (*subjects*) and between bishops (*community*) as they relate to the work and role of Cott in ACSA (Figure 5.2) create tensions between the elements of the activity system. In the case of Cott staff, in order to create an environment where academic colleagues, despite differences in their understandings of the core business of the organisation to which they are all contracted, work with each other collaboratively and

collegially, there would be a need for enabling mediation artefacts which might not necessarily be readily available in the organisation (Cott). Such mediation artefacts might be experts in the area of clergy leadership formation or theological education curriculum design who might be asked to assist Cott staff and ACSA bishops with workshops on the concepts in question. This would also require allocating time for such workshops which, unintentionally, would compound the time constraints which are already experienced in the routine operations of the organisation (refer to Table 5.3; interviewee 5).

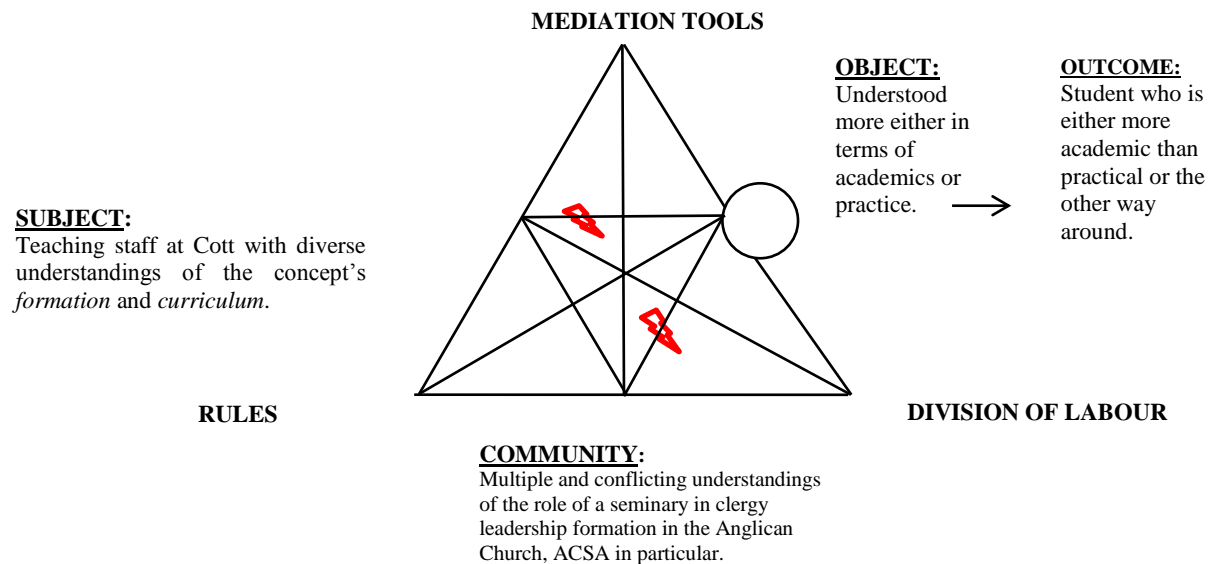
Further, the emphasis of *cognition related processes* rather than *practice orientated activities* in the facilitation of the Cott formation programme marginalises those courses on the curriculum which require the involvement of students in practical work or work integrated learning. This puts facilitators of such courses in a dilemma pertaining to *mediation instruments* as they would still be required to comply with the full requirements of their courses.

While the increase in the number of academic programmes offered at Cott is a positive development, particularly considering the need to expand and broaden the *object* of the activity system, it means in return unmanageable workloads for the teaching and administration staff who have increased by a small margin. Further, it would mean a demand for more teaching and learning spaces and material resources which Cott, given her small revenue base, has not been able to sufficiently cater for financially (refer to Table 5.3; interviewee 5). This has resulted in unintended consequences such as constrained and ineffective performance by staff and students. Applying CHAT 2<sup>nd</sup> generation framework, tensions emerge here between intention (*object*) and capacity in the domains of the *subject* and *mediation instruments* of the activity system.

Some of the ACSA bishops who understand Cott as the foundation for parish ministry, ordain and deploy their students to lead parishes as soon as they complete their studies at Cott. In most cases, this is done on the assumption that Cott would have adequately prepared the students for all church ministries which, as explained by Interviewee 4 in *Extract 1*, is not an accurate understanding of the role played by Cott in the formation of clergy leaders in ACSA. On the other hand, Cott works on the understanding that what the College is not able to cover during the residential formation time of the students would be the responsibility of the sending dioceses (see Annexure 5.1). This suggests discord in working relationships between

Cott and some of the dioceses in ACSA. Revealed here are tensions between the *subject* and *division of labour* elements of the activity system.

In view of the above, two contradictions surfaced within the Cott formation activity system as presented and explained below:



**Figure 5.15: Illustration of secondary contradictions within Cott formation activity system**

(i) Between subject and object elements of the activity system: It emerged from the findings that individual teaching staff at Cott, because of their diverse academic and theological orientations, have strong convictions about what should be emphasised in clergy leadership formation programmes and activities particularly in relation to curriculum design and facilitation methodology. Historically, this tension has characterised Anglican Church (ACSA in particular) clergy leadership formation programmes and activities (refer to Chapter Four). However, application of the understanding of *object* within the CHAT framework as discussed in Section 2.3.2 suggests that the diversity and subjectivity implied in this analysis should not be dismissed entirely as a constraint to achieving the goal and outcome of the activity system (as stated in Figure 5.2). Rather, Cott should be concerned about creating an enabling and accommodating environment where individual formator contribution towards achieving the *object* and *outcome* of the activity system is affirmed, acknowledged and used accordingly (see Chapter Six).

(ii) Between *community* and *object* elements of the activity system: Bishops in ACSA are the primary supporters of the Cott activity system. Firstly, they send students to Cott on sponsorship. Secondly, the decision to keep Cott operational rests in their hands. However, because of the history of the Anglican Church, particularly ACSA (refer to Chapter Four), bishops are products of contextual clergy leadership formation programmes and activities (refer to Chapter Eight). In addition, bishops in the Anglican Church have autonomous power in their ecclesiastical divisions (dioceses) (refer to Chapter Four). What is implied in this observation is that bishops in ACSA should be custodians of contextual and historical understandings of clergy leadership formation over and above the stipulations of the ACSA Constitution and Canons (see 1.2.2).

What comes out strongly from this analysis is that the Cott activity system would struggle to realise the *object* and *outcome* stated in Figure 5.2 if bishops, the support bedrock of the organisation, continue to disregard the stipulations of the ACSA Constitution and Canons on clergy leadership formation.

#### **5.4.2 Contradictions within the Cott management activity system**

In Figure 5.1 the *object* of the Cott management activity system is stated as *qualifications in theology for ordained ministry* and the *outcome* as *accredited qualifications in theology*. The word *management* in the title encapsulates the emphasis in the goal of the activity system which is effective management of all formation activities at Cott towards successful completion of accredited qualifications in theology. This qualified the activity system as central in the Cott case study (refer to 3.2.3). During the data collection phase, it was noted that the concept *management* was understood in relation to four business orientated principles namely: planning, organising, leading, and controlling (Drucker, 1990; Skidmore, 1995; Nelson, 1996). As such, it was within the processes, deliberations and sentiments which fell under these identified management principles that manifestations of a primary contradiction arose within the elements of the activity system as illustrated in Table 5.4 in the next section.

##### **5.4.2.1 Manifestations of the primary contradiction**

***Table 5.4: Manifestations of the primary contradiction within the elements of the Cott management activity system***

Source of contradiction	Evidence indicators	Manifestation of primary contradiction
<b>Planning</b>	<p><i>We are in our 3<sup>rd</sup> year of offering an accredited Diploma in Theology qualification and there is so much required of the administration and teaching staff to know and adhere to in our management and facilitation of the programme. Currently, we hardly do any other business in our meetings other than discussing academic matters particularly now as we anticipate a site visit in a few months' time.</i> [Cfg2]</p>	<p>Manifestation of the primary contradiction is located in the <i>subject</i> of the activity system: Cott staff lack capacity to cope with the demands of the new and accredited qualification.</p>
	<p><i>Our curriculum review process is aimed at developing an academic philosophy at Cott which articulates the vision, mission and values of ACSA. We agreed from the word go that this is a more encompassing process which transcends but takes cognisance of individual staff academic formation orientation. We will certainly need staff development programmes so as to be equipped with the relevant knowledge and skills for these developments at Cott. This year we have prioritised workshops in revision of the College Vision and Mission statement; curriculum enhancement which includes re-design of courses; course alignment across the three years of the qualification; and course assessment processes.</i> [Cfg2]</p>	<p>Manifestation of the primary contradiction surfaces in the <i>subject</i>: Cott staff lack sufficient knowledge and skills necessary and needed for effective facilitation and management of the new accredited qualifications. Individual staff rely more on their personal academic orientations than the prescribed approaches and methods for the qualification being facilitated.</p>
<b>Organising</b>	<p><i>Currently, we are also giving attention to Anglican Student Federation (ASF) ... as a way of articulating an understanding of ministry as both profession and vocation. These are people who will lead our communities as influential decision makers in the future. Church should capitalise on their interest to grow spiritually as members of the Anglican Church. We need to do more of this kind of visibility in the ACSA.</i> [Cint3]</p>	<p>Manifestation of the primary contradiction is located in the <i>community</i> and <i>object</i> elements of the activity system: there are some organisations which form part of the community of the activity system such as the ASF which are not sufficiently networked with Cott. This would therefore entail the need to broaden or re-conceptualise the object of the activity system.</p>
	<p><i>Leadership responsibilities have increased at Cott with the developments which have happened over the past five years. Previously, the locus of responsibility evolved around the Rector of the College. There is therefore needing to induct new portfolio holders so as to ensure that everybody is aware of their duties and how they ought to work as part of a team.</i> [Cfg1]</p>	<p>Manifestation of the primary contradiction is located in the <i>subject</i> of the activity system: some of the staff in leadership and management responsibilities is not well versed with what is required of them in their portfolios as individuals and as part of a management team.</p>

	<p><i>There is need for balance between church and corporate world environments in terms of management practices, for example implementation of policies. Corporate world enforces rules of the book whereas church priorities mercy. This raises issues with regard to the formation of students as future leaders of the church: what models of leadership and management do they learn from what they experience of the College administration?</i> [Cfg1]</p>	<p>Manifestation of the primary contradiction is located in the <i>mediation instruments</i> element of the activity system: it appears that it is not clear for Cott management personnel how policy implementation in church and corporate contexts interface as both approaches are important in the formation of students for ordination in ACSA.</p>
<p><b>Controlling</b></p>	<p><i>There is a need to understand the philosophies framing SAQA and CHE for compliance purposes. The former seems to be more inclusive in practice, emphasising access and ease of transition across the NQF framework for the purpose of lifelong learning whereas the latter, while acknowledging the importance of access and articulation, due to its role as the developer of policy and a framework for qualification standards from NQF (National Qualification Framework) 6 to 10, emphasises quality control.</i> [Cint2]</p>	<p>Manifestation of the primary contradiction is surfaced in the <i>rules</i> element of the activity system: Cott management personnel are not sufficiently clear on how SAQA and CHE rules and policies complement. There seems to be the possibility of some inconsistencies in the discourses and interpretation of policies between these two bodies and their policy guidance publications which ought to be grasped by those in management at Cott.</p>
	<p><i>Currently we support students with academic writing skills and English language, to those who need such assistance, at 1<sup>st</sup> year level. However, we have noted that the majority of our students would need continued assistance with such support throughout their time of study at the College. As part of our curriculum review, we are considering extending this support to all streams as may be required. Student support should be institutional rather than taught in a remedial or marginalised space.</i> [Cint2]</p>	<p>Manifestation of the primary contradiction is located in the <i>mediation instruments</i> element of the activity system: support for students with English language needs is currently offered to students at 1<sup>st</sup> year level and yet the reality is that there are some students who would need such support throughout their time of formation at Cott.</p>
	<p><i>Cott community is diverse which presents us with the challenge of language. We are all forced to use English in all managerial interactions and work processes here, particularly in the academic programme. It is not always easy for everybody, especially students who come from non-English speaking countries such as Mozambique and Angola. However, we have a student support mechanism in this regard where those who need help with English receive the assistance of qualified external experts in the language.</i> [Cfg1]</p>	<p>Manifestation of the primary contradiction is located in the <i>mediation instruments</i> element of the activity system: some members of the Cott community are not familiar with the medium of communication (English language).</p>

	<p><i>How do we endeavour to ensure that our theological statement matches our practical responses to contemporary concerns such as climate change; abuse of power in both church and secular world; insecurity of vulnerable members of our communities such as women and children? For instance, in practical terms, what is our attitude about our grounds here? Take for instance a case of the differentiated dust bins which we introduced at the beginning of the year which were given to the College by the ACSA Environmental organisation (Green Anglicans). It was very difficult for some members of the College community to read what is written on the dust bins so as to dispose of their litter accordingly (see Annexure 5.2). [Cint3]</i></p>	<p>Manifestation of the primary contradiction surfaces in two elements of the activity system namely <i>subject</i> and <i>mediation instruments</i>. The subjects are not adequately applying theory learnt through the College curriculum which, for instance, takes a huge and deep interest in contemporary socio-political, economic and cultural matters such as climate change. In terms of mediation tools, Cott is struggling to find effective ways of sending across the theological teaching which emphasises the need and importance of applying knowledge accrued in practical ways in context.</p>
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It can be concluded that the primary contradiction revealed within the elements of the Cott management activity system is limited management capacity. It is evidenced in the data analysed that an increase in programmes and processes related to the *object* and *outcome* of the activity system (see Figure 5.1) had not matched with the capacity of the organisational management personnel in terms of size, knowledge and skills. Further, the findings suggest that up until the time when this study was done, management responsibilities had been centralised in the Rector of the College. In contrast, the expansion of the *object* of the activity system required a de-centralisation of management responsibilities in the organisation and empowerment of current management personnel with the requisite knowledge and skills. Moreover, there would be need for additional ably and appropriately qualified personnel to boost the management manpower of the organisation.

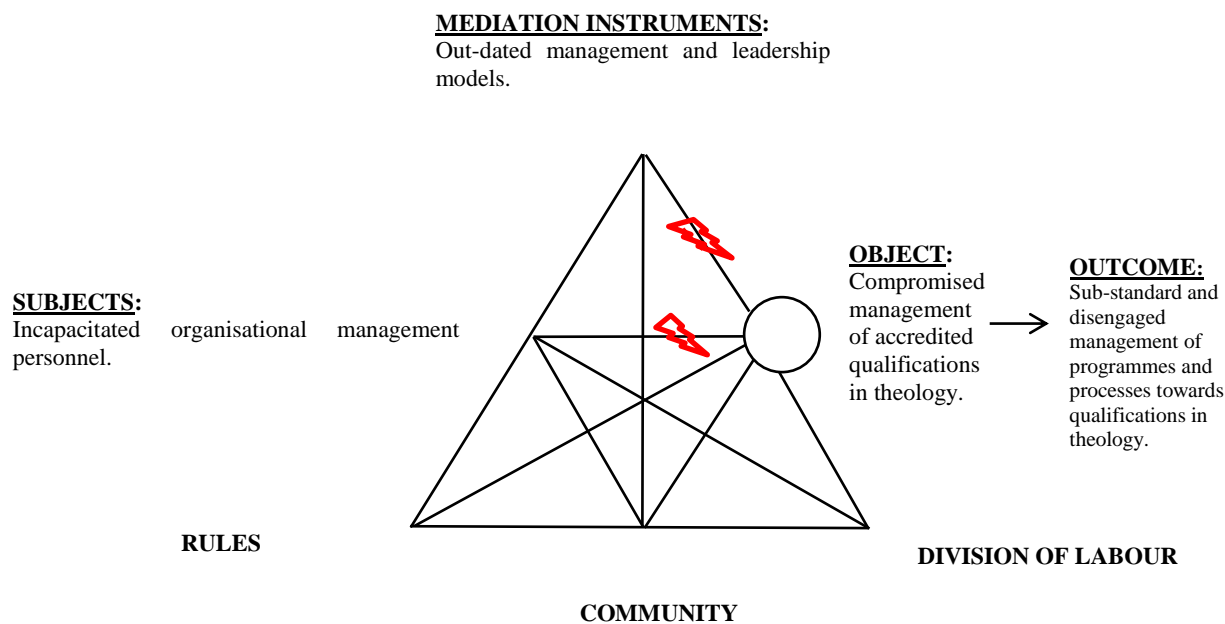
Failure to do the above would negatively impact the organisation. For instance, failure to observe the requirements of CHE, through the oversight of a mandated structure, HEQC, Cott would forfeit her registration and accreditation statuses. As such, it was for the safety of the organisation that staff, particularly those in the College management team, was informed of the DoHET statutes for compliance purposes.

#### 5.4.2.2 Secondary contradictions

The analysis of the manifestations of the primary contradiction in the Cott management activity system done in the previous section shows more occurrences of such in the *subject* and *mediation instruments* elements. In section 3.4.3 I explained that Cott was transitioning from offering an unaccredited academic programme to an accredited one at the time this research was done, hence the congestion of manifestations of the primary contradiction in the domain of agency (subject/s) and methodology (*mediation instruments*).

It follows therefore that in terms of secondary contradictions, if the identified issues which emerge as manifestations of the primary contradiction in the *subject/s* and *mediation instruments* elements (see Table 5.4) had not been attended to, it would have been futile to pursue the *object* of the activity system (see Figure 5.1). Therefore, it can be concluded that two secondary contradictions surface within the activity system: between the *object* and *mediation instruments* elements; and between the *subject/s* and *object* elements (see Figure 5.16). It can be said that in the former secondary contradiction, the critical issue suggested in the analysed research findings revolves around the management and leadership models which were used at Cott prior to the registration of the College and accreditation of academic qualifications offered. Regarding the latter secondary contradiction, as explained in relation to the primary contradiction, the critical issue is the limitedness of management capacity in organisational personnel (subjects) in terms of knowledge and skills required to realise the *object* and *outcome* of the activity system (see Figure 5.1).

Using Engeström's CHAT 2<sup>nd</sup> generation conceptualisation of activity theory, I illustrate below secondary contradictions which surface within the Cott management activity system as discussed above.

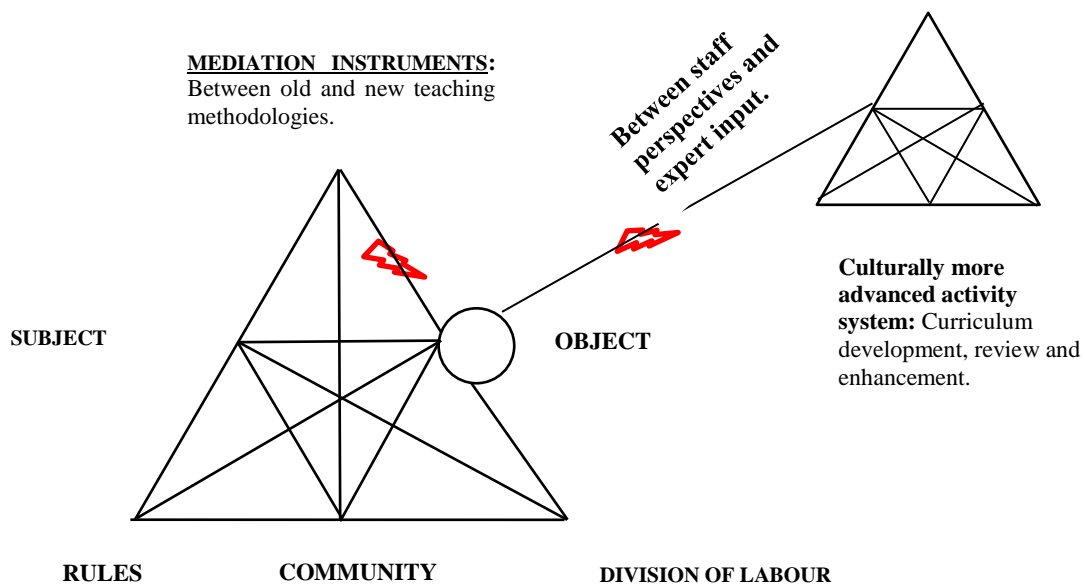


*Figure 5.16 - Illustration of secondary contradictions within Cott management activity system*

#### ***5.4.2.3 Tertiary contradictions within Cott formation and Cott management activity systems***

As explained already in previous sections, the research process for the study happened at a time when Cott had introduced a new and accredited curriculum. This had entailed the need for Cott staff to adjust to the new academic programme in a holistic sense but particularly in terms of management and facilitation of teaching and learning activities therein in line with DoHET legislation (refer to Extract 1, Table 5.3 and 5.4).

A critical aspect of the transitional period at Cott was curriculum development, review and enhancement processes and activities which required the input and guidance of experts in the field among teaching staff and from outside the organisation where and when it was considered necessary. In Engeström's CHAT 2<sup>nd</sup> generation theoretical framework, such an activity is understood as "culturally more advanced" as it is aimed at mediating transformation or "reconfiguration" of the old activity system (Engeström, 2005). In the case of this study, it was the new and accredited curriculum which had replaced the old curriculum (refer to Extract 1, Table 5.3 and 5.4). As explained in 2.3.3.3.1, Engeström uses the term *tertiary* to refer to the contradictions which emerge between the old and new activity systems as illustrated in Figure 5.17 and analytically discussed in Section 5.4.1 and 5.4.2.



**Figure 5.17: Illustration of tertiary contradictions between Cott formation and Cott management activity systems (refer to Extract 1, Table 5.3; 5.4)**

Summarised, tertiary contradictions encountered in the facilitation of discussions and deliberations of the new and culturally more advanced activity system (*curriculum development, review and enhancement*) as presented and discussed in Section 5.4.1 and 5.4.2 relate to concerns about the *what* and the *how* in the conceptualisation, planning, facilitation, management and evaluation of educational programmes. It is for this reason that the revealed tertiary contradictions as illustrated in Figure 5.17 are on:

- the *what* between subject experts (interventionists) and Cott teaching staff who, as individuals, had different understandings of some of the aspects of the *object* of the activity system (curriculum development, review and enhancement).
- the *how* between old teaching methodologies as used by Cott staff and new teaching methodologies as suggested by subject experts (interventionists).

### **5.4.3 Contradictions within Cott experiential learning activity system**

In Section 1.2.2 I explained how and why the Cott experiential learning activity system was jointly facilitated by Cott management and Hope Africa, an affiliate organisation of the Diocesan formators activity system. The programme is aimed at exposing students (future clergy in formation and training) to diverse ministerial contexts in ACSA and beyond. The envisioned outcome of the programme is students (future clergy) who are widely informed

about ordained ministry in the world and can, as a result of that exposure, embrace diversity and serve effectively in any context beyond those that they are familiar with (see Figure 5.4).

Strategically, this programme is offered to final year students at Cott. A full week on the Cott – Hope Africa Year Planner is allocated for this programme which happens in a carefully selected place in ACSA. At the time this research was done, the programme was in its 3<sup>rd</sup> year of operation.

The data which was gathered revealed a primary contradiction within the activity system between programme conceptualisation and management and holistic orientation of the qualification offered. As detailed in the next section, manifestations of the primary contradiction revealed from the manner in which the programme was planned, organised (in terms of programme itinerary), facilitated, assessed, and evaluated each year.

#### ***5.4.3.1 Manifestations of the primary contradiction***

Manifestations of the primary contradiction within the activity system were revealed as captured in Extract 2 below which was compiled following a focus group discussion (Cfg4).

**Researcher:** *Why is it important for Cott to add an experiential learning programme to the curriculum?*

**Interviewee 1:** *It aligns with what is expected of the College by DoHET in terms of curriculum design and facilitation of formation and training. I can explain to you that a level description of the academic qualification which we are offering (360 credit bearing Diploma in Theology) places emphasis on professional competency which therefore calls for the inclusion of work integrated learning in our facilitation of learning and training here. My reading of the CHE policy documents says that a 360-credit diploma qualification can have up to 120 credits for integrated learning and 240 for theoretical engagement. This is not clearly designed into our current diploma qualification document (written curriculum). Therefore, the experiential learning programme will go a long way in covering the work integrated component of our diploma qualification.*

**Interviewee 2:** *The words “integrated learning” speak for themselves. As my colleague has alluded to, we teach students theory the bulk of the time spent on facilitation of the curriculum (notional hours) with very little allocation of time for testing the theory learnt on practical engagements in the world out there. Beyond that, you know these students are coming from different contexts and, I think this applies to the majority; they have not been exposed to other contexts where the church is at work in response to local practical needs. So, it is envisioned that the experiential learning programme will help to create spaces for in-depth reflections on the relevance and applicability of learnt theory on local practical concerns and needs. It is about people and their life battles which you do not find in the closed spaces of lecture rooms (Extract 2).*

The two responses in the extract agree in emphasising that there was need for the inclusion of an experiential learning component to the Cott clergy leadership formation and training programme. However, two emphases emerge from the responses which are: *Interviewee 1* emphasises DoHET legislation more while *Interviewee 2* elevates the need for intentional planning of formation and training programmes for future church leaders on the basis of the needs of the church and the world at large.

Joint facilitation of the Cott experiential learning programme between Cott management (based in the Eastern Cape) and Hope Africa (based in the Western Cape) demanded effective communication on programme logistics between the two organisations. This was necessary for all aspects of the programme, particularly planning. However, the data gathered showed that individuals involved in the planning of the programme did not always have the same understanding of how and where the programme would be run each year. A lead question which I used during the research process to surface contradictions from this activity system, particularly in relation to the *subject(s)*, *mediation tools* and *division of labour* elements was: *how do the two organisations collaborate on planning the programme activities each year?* Interviewees responded to the question as presented in Extract 3 below:

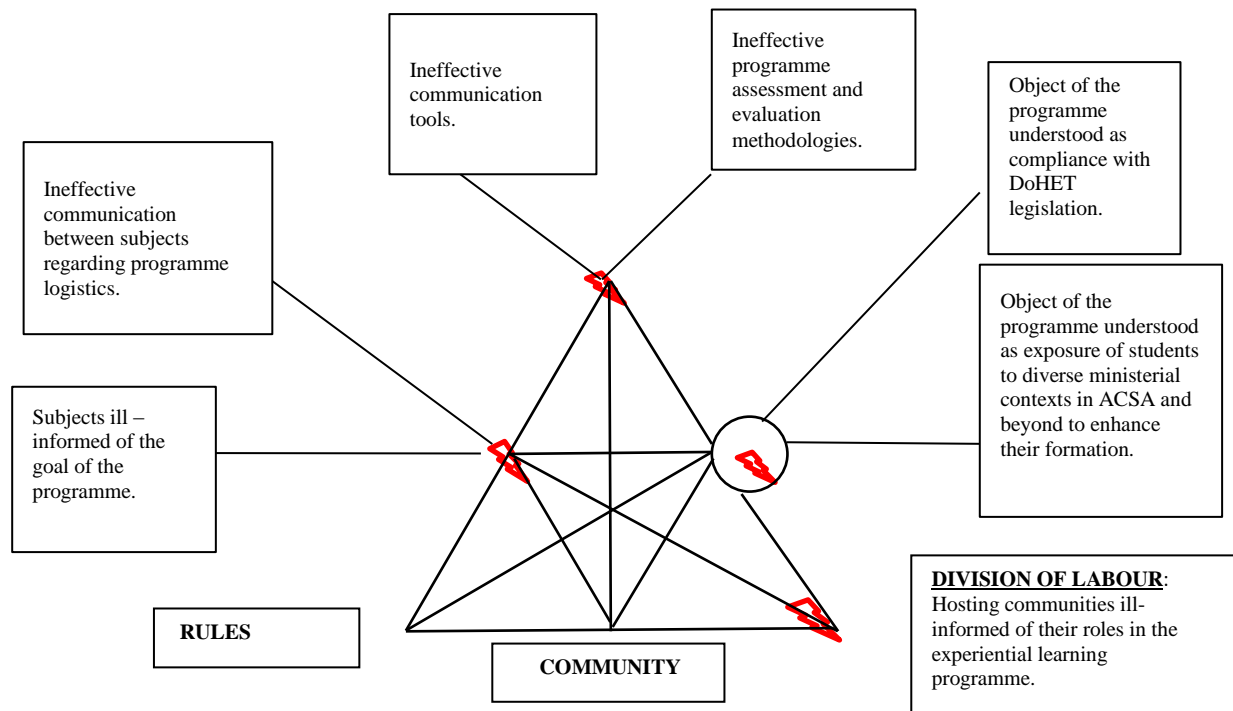
**Cint5:** *We try to initiate the conversation early in the year ... in fact we factor the programme in our annual planning meeting. Electronic communication has not been the best way to communicate with each other on this matter. We have a situation whereby you write an e-mail and your correspondent acknowledges receiving the e-mail but a week or two later, a different member from the other organisation writes you a different e-mail sending the same request or information as communicated by the initial correspondent. Another scenario is whereby you send information which receives acknowledgement but along the way, you receive a request for the same information from the same person who would have acknowledged receiving the information initially. At the end of the day, the whole thing does not come together but we still end up facilitating the programme even with such poor preparations and planning.*

**Cint4:** *The thing is that all progress is hinged on availability of money. If the financial resources are not permitting, it is difficult to move to the next step as would have been planned. Personally, I prefer bringing all interested parties together, discuss what needs to be discussed and agree on programme logistics once and for all. The lesser and finer details can always be communicated in the process of finalising the programme. This thing of e-mails ... not for me.*

**Cint4:** *On some occasions phoning is very helpful but on others, calls are missed because there is no prior arrangement to have a telephonic conversation on a particular date. At times the person requested for would have gone to a meeting or class and that opportunity to discuss matters relating to the programme is lost. Follow ups on such lost opportunities have not always been successful. As a result, we find ourselves on different understandings of the programme preparations.*

**Cint6:** *You know what, I actually know very little about the logistics of this programme even though I am in this central office. This is part of my work; I actually need to know more about the programme logistics particularly now as we move towards introducing a broader work integrated component to our academic programme. I feel like I am a stranger in my office, you know. Ever since I got into this office (responsibility) I have tried to establish how we have been organising and facilitating this programme but each time I find myself giving up the effort for another time. You get what I mean? (Extract 3).*

Ineffective communication comes to the fore in the statements in Extract 3 as the critical source of tensions between the *subjects* involved in the planning and organisation of the Cott experiential learning programme. Further to these tensions, it was observed during the data gathering process that preparatory work involving students and hosting communities had not always been effectively done to the effect that some of the time which had been intended for experiential learning had been spent discussing programme logistics. It was also observed that there had been inconsistencies in the nature of assessment tools and programme evaluation methodologies (mediation instruments) used in the programme over the period that the programme had been facilitated. In view of the above, Figure 5.18 below illustrates manifestations of the primary contradiction emerging within the elements of the activity system.



**Figure 5.18:** *Illustration of manifestations of the primary contradiction within the Cott experiential learning activity system.*

#### 5.4.3.2 Secondary contradictions

In Figure 5.4, the object and outcome of the Cott experiential learning activity system are stated as *exposure (of students) to different ministerial contexts in ACSA and beyond* and *embodied, contextually alert clergy*, respectively. To realise these targets, effective communication and well-coordinated planning between the Cott administration team and Hope Africa would have been critical requirements for the activity system. Additionally, it would have been a requirement for Cott and Hope Africa to design an experiential learning programme which acknowledged and emphasised the complementary relationship between theory and practical engagement in the facilitation of the formation and training of future clergy leadership for ACSA and the world at large.

Further analysis of the research findings revealed that the collaboration between Cott and Hope Africa on the *object* of the activity system (see Figure 5.4) had a history going as far back as 2004. Over the years, depending on curriculum developments and changes which happened at Cott (see Figure 6.5; 6.6; 6.7; refer to 6.3.3.1), the activity system took a different model which would have required staff development and adjustments in *mediation instruments* as the curriculum changes happened. It would seem that such changes had negatively impacted the smooth flow of the planning and facilitation of the programme.

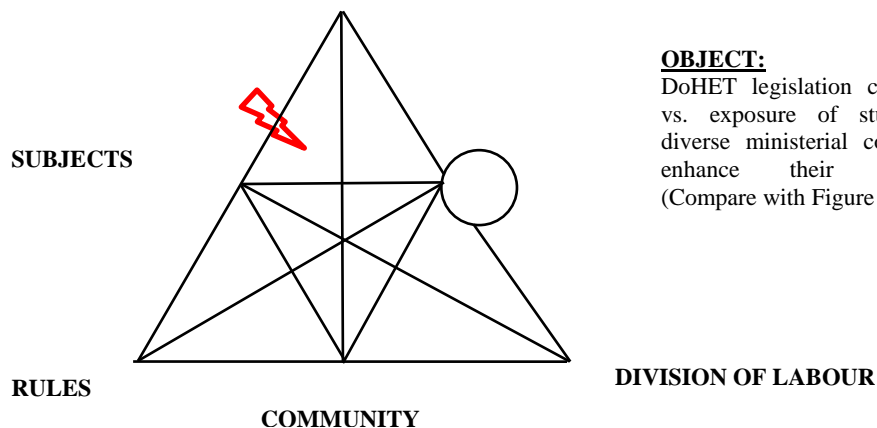
Consequently, because of these prevailing circumstances in the activity system in addition to the information discussed in Section 5.4.3.1, two secondary contradictions surface:

(i) between the *subject/s* and *object* elements of the activity system in a two-fold manner: *subjects* who were inadequately informed of the *object* of the experiential learning programme; and *subjects* who were ill-coordinated and ineffective in their preparations for the programme, thus negatively impacting the *object* of the programme.

(ii) between *mediation instruments* and the *object* elements of the activity system: the changes in the curriculum offered at Cott were not always followed up with adjustments of facilitation, assessment and evaluation *mediation instruments* for the Cott experiential learning programme.

I illustrate the two secondary contradictions surfaced in the activity system in Figure 5.19 below:

**MEDIATION INSTRUMENTS:** Planning strategies, facilitation methodologies and evaluation methods based on old models of the programme.

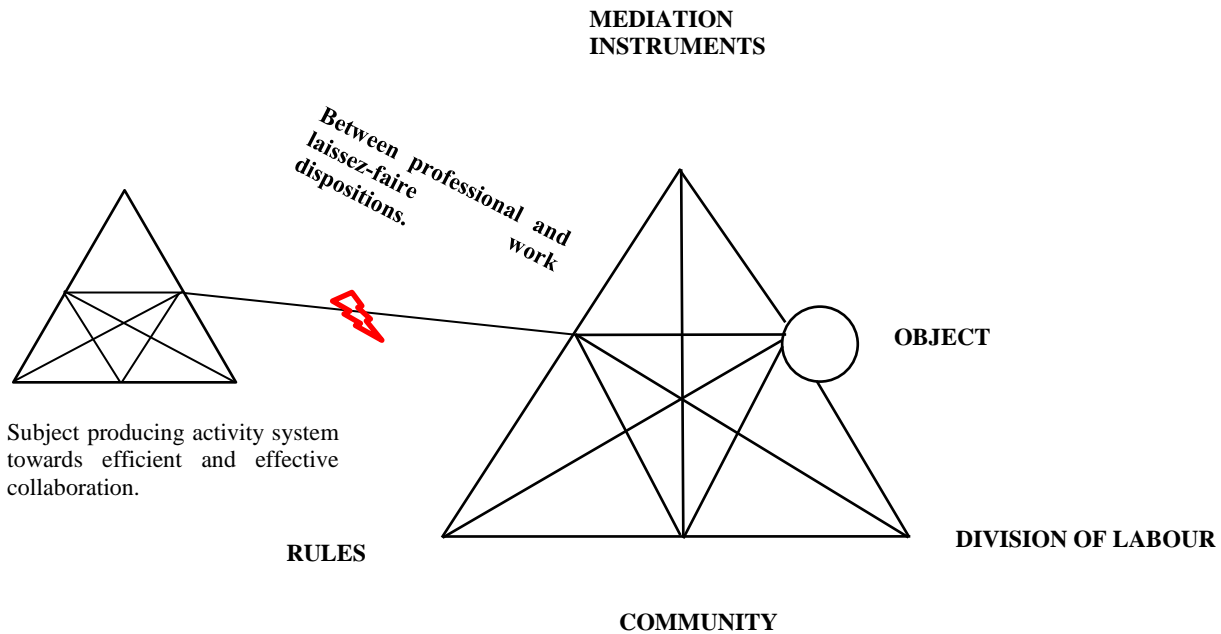


*Figure 5.19: Illustration of secondary contradiction within the Cott experiential learning activity system*

#### **5.4.3.3 Quaternary contradictions within Cott experiential learning activity system**

According to Engeström (2005), quaternary contradictions surface when “a neighbouring” activity system is drawn into collaboration with the central activity system. In Engeström’s CHAT framework, interacting activity systems are represented in the 3<sup>rd</sup> generation as explained and illustrated in Section 2.3.3.3. The collaboration between Cott administration and Hope Africa (an affiliate organisation of Diocesan formators activity system as explained in 1.2.2) in the facilitation of the Cott experiential learning programme is a typical inter-activity system collaboration within which quaternary contradictions surface. As discussed, and explained in 1.2.2 and in the previous section, Hope Africa is drawn into collaboration with Cott administration in facilitating the Cott experiential learning programme for two main reasons:

- i) Their work has an interest in the facilitation of clergy leadership formation among other development programmes.
- ii) They are sufficiently resourced (financial, material, human) to partner or assist organisations which have similar organisational interests as theirs such as Cott. However, because of the conflicted personnel understandings of the changes happening in the activity system, contradictions have surfaced in the collaboration between Hope Africa and Cott as explained in the previous sections (5.4.3.1; 5.4.3.2) and illustrated diagrammatically below (Figure 5.20).



*Figure 5.20: Illustration of quaternary contradictions within the inter-activity system involving Cott administration (Cott case study) and Hope Africa (ACSA Ministry and Training case study)*

## 5.5 ANALYSIS OF CONTRADICTIONS ACROSS CASE STUDIES

The chapter reveals some common contradictions across the case studies encountered by research participants in their different clergy leadership formation programmes and practices. Key concepts in relation to the common object between the two case studies (refer to 3.2.3) which have emerged in the analyses and discussions of the surfaced contradictions across the case studies are conceptualisation, planning, facilitation, and management (see Tables 5.1; 5.3) or equivalent terms such as organising, controlling, leading, and balance (see Table 5.4). These observations have theoretical and methodological implications to the manner in which the study was approached which I critically discuss in Chapter Seven, Eight and Nine.

In Section 5.4.2 clarity on the implications and significance of these highlighted concepts in clergy leadership formation programmes and processes was sought from organisational theory. In Chapter Four which investigated the historical background to clergy leadership formation programmes and processes, with a focus on the Anglican Church, the same concepts reinforced the framework within which the investigation and discussion was done.

In line with the purpose of the study, the extent to which these concepts could be used as investigative and analytical tools towards establishing and developing transforming models in the facilitation of clergy leadership formation programmes in ACSA is explored and discussed extensively in Chapter Six, Seven and Eight.

## **5.6 CONCLUSION**

On the basis of inductive and abductive analyses, the chapter focused on discussing contradictions faced by participants involved in the facilitation of clergy leadership formation programmes in ACSA. Using Engeström's CHAT 2<sup>nd</sup> and 3<sup>rd</sup> generation frameworks, the presentation noted that the different contradictions were variously located, that is within or between the elements of an activity system while others were between interacting activity systems. Further, data analysis revealed operational concepts in the facilitation of clergy leadership formation programmes in ACSA which created frames within which the contradictions emerged and were subsequently analysed. The concepts are: conceptualisation, planning (organising), facilitation (leading), and management (controlling, evaluation, recommendations). The next chapter focuses on expansive learning processes in the two case studies used in the study on the basis of contradictions revealed and discussed in this chapter.

## **CHAPTER SIX: EXPANSIVE LEARNING IN ACSA CLERGY LEADERSHIP FORMATION PROCESSES: AN ANALYSIS OF THE TWO CASE STUDIES**

### **6.1 INTRODUCTION**

Chapter Five revealed contradictions within the two case studies which preoccupy this study, thus addressing the first phase of the research process (investigative phase) (refer to 3.3.2) and responding to the research question: *What learning in facilitation of clergy leadership formation takes place among different participant groups in ACSA?* The purpose of revealing the contradictions was to initiate change in the facilitation of clergy leadership formation programmes and processes in ACSA which is the preoccupation of this chapter in response to the research questions: (i) *What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?* (ii) *What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?*

This chapter addresses the two stages of the expansive learning framework (2<sup>nd</sup> phase of the research process) by, in the first instance, describing how some of the contradictions within the two case studies were surfaced and analysed and then, in the second instance, describing how solutions to the contradictions were modelled by research participants (see 2.3.3.3.3; 3.3.2). This is achieved through an analysis of how shared goals between participants were identified and a description of the boundary crossing that took place between activity systems in the two case studies involved in this study.

At this stage of the research process, the main method employed was CLWs (refer to 3.4.4). Section 3.4.4.1 details how CLWs were organised and facilitated within the DWR framework as developed and used by researchers such as Engeström (2007) and Sannino (2008).

### **6.2 LOCATING ACSA CLERGY LEADERSHIP FORMATION PRACTICES WITHIN DWR FRAMEWORK**

Warmington et al. (2005) explain that the essence of the expansive learning cycle as an analytical component of the DWR framework is in the participant's capacity to interpret and expand the goal of the object of an activity system in ways that produce culturally new

patterns and understandings of the activity. It is the assumption here that observed participant interactions (1<sup>st</sup> phase of research process) would lead to a deepening analysis of the situation that exists in the activity context with the potential of revealing embedded tensions and contradictions (2<sup>nd</sup> phase of research process) which, in the case of this study, was the preoccupation of Chapter Five. Thus Warmington et al. (2005), concurring with Engeström and Sannino (2010), emphasise that expansive learning ignites change in organisational practices in two particular ways, namely, holistic development of individual organisational members and construction of a new object for the collective activity which implies enhanced organisational practices. In the case of this study, facilitators of clergy leadership formation programmes and processes in ACSA would be equipped with requisite knowledge and skills which would enable them to transform the prevailing understandings of their practice (object), thereby contributing towards transforming current processes and activities in line with the envisioned outcome of their engagements (refer to 5.2).

Further, Warmington et al. (2005) argues that the following elements are ingrained in CLWs which have implications for agential expansive learning and transformation of organisational practices:

- facilitation of practitioners' "reflective systemic analysis" as a means of engendering and promoting change in professional thinking, practices and organisational cultures;
- promotion of systemic change in organisational practices by focusing systemic analysis upon (a) collective learning challenges facing practitioners and organisations in the drive towards multiagency working (b) the surfacing of contradictions in past and present practice that might point towards new forms of professional practice (future objects); and
- production of strong conceptual resources for practitioners to use when engaging in the new practices demanded by changes in structural tools such as policies (using the workshop sequence to confront professionals' "everyday concepts" with "scientific concepts" derived from activity theory analysis, thereby generating a process of remediation, the creation of tools appropriate to emergent forms of practice) (see Table 6.1).

In acknowledgement of the relevance of these theoretical guidelines to the study, it was necessary to encourage reflexivity in participants as facilitators of clergy leadership formation programmes in ACSA (see 7.3). Delanty (2005, p. 120) asserts that doing so helps to create spaces for "self-transformative capacity involving the use of knowledge to generate

further knowledge” by focusing on the relational encounter of subjectivity with objectivity. In relation to this postulation, Edwards (2007) adds that the dialectical relationship between the subject and the object is paradoxical in the sense that, as a result of the subjects working on the object, the latter, in return, works back on the subjectivity of the subjects and their approach to the object. In the case of this study, as facilitators of clergy leadership formation programmes in ACSA worked towards developing transforming and collaborative models for their practices (object), their agency was enhanced through collective “reflexive systemic analysis” (Warmington et al., 2005, p. 11) of contradictions surfaced within and between the case studies involved in the study.

I now turn to discussing expansive learning as it was experienced by the research participants in each of the two case studies.

### **6.3 EXPANSIVE LEARNING IN THE ACSA MINISTRY AND TRAINING CASE STUDY**

#### **6.3.1 CLW participants and processes**

In Section 3.4.4.1, I presented in a nutshell the structure and administration processes of CLWs which I facilitated involving participants of the two case studies which form the basis of this study. As explained and illustrated in Section 3.2.3, the ACSA ministry and training case study has two activity systems namely ABoTE and Diocesan formators. In Section 5.2 and 5.3 I gave details of who the participants of the two activity systems were and what their collective objects were. In Section 2.3.3.3.3, I alluded to the annual gatherings of representative members of both activity systems at Cott to do inter-diocesan consultations (TfM) and how I took the opportunity to involve selected members in CLWs on clergy leadership formation programmes and processes in ACSA.

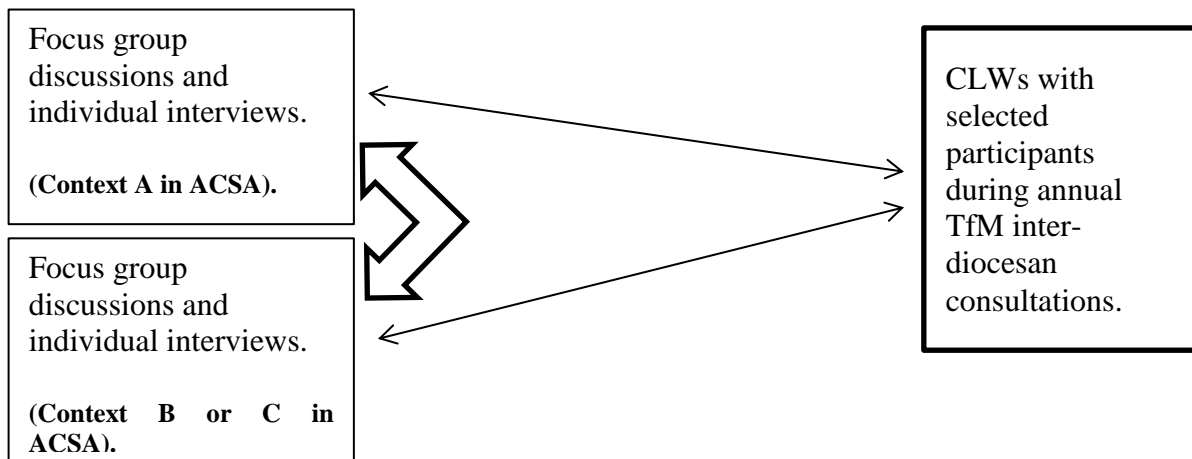
Linked to the above, in Section 3.3.1 and 5.3.1.1, I explained that contextual profiling findings (*mirror data*) revealed that ACSA has diverse contexts which have implications for understandings and facilitations of clergy leadership formation. As such, in view of the purpose of the study and contextual profiling findings, I had to be strategic in my organisation of research processes and activities. I therefore designed a research plan with representative members of the two activity systems in the following ways:

- (i) focus group discussions and individual interviews with members of the activity systems at diocese level (refer to 1.2.2; 3.4; 5.3);

- (ii) CLWs with members of the activity systems at their annual inter-diocesan consultations at Cott (refer to 1.2.2; 3.4; Figure 5.8; 5.9).

Strategically, therefore, this approach was used with the objective of covering as much geographical location with implications for the facilitation of clergy leadership formation programmes and processes in ACSA. The information gathered from participants at diocese level was used as *mirror data* at the CLW sessions (see 3.3.2.1; 3.4.4.1; Table 6.3).

I illustrate in the form of a diagram in Figure 6.1 how I designed this research process. The arrows are double edged as an indicator that there was cross pollination of critical information between the different instances of interaction with the research participants (refer to 3.4).



**Figure 6.1: Illustration of the organisation and facilitation of CLWs within the ACSA ministry and training case study**

In Figure 3.5 I illustrated the layout of the CLWs which I facilitated in the research process. In the following sections I give details of the proceedings and processes which I followed in the CLWs with representative members of the ACSA ministry and training case study to ascertain the mediation tools and objects pertaining to clergy leadership formation programmes and activities in ACSA.

### 6.3.2 Introducing conceptual tools

After I had introduced the CLWs as illustrated in Figure 3.5, the first substantial task was to present to the participants the key theoretical frameworks which informed my research processes. I explained the expansive learning cycle first as conceptualised by Daniels (2008)

and Engeström (1987, 2008; Figure 3.9) within the CHAT framework. The presentation was aimed at orientating the participants to the learning journey that we had embarked on together through CLWs.

Further, I emphasised three aspects about the expansive learning cycle in connection with agential and organisational transformation as expounded by Engeström (1999); Delanty (2005); Warmington et al. (2005) and Edwards (2007) which are: systems approach orientation; learning that happens in context in and between organisational members; and the developmental perspective to organisational practices (see Figure 3.8; refer to 6.2). The objective of this explanation was to elaborate the theoretical premise that emphasises that it is through collective activities such as CLWs that agents can construct meaning out of their practices from which they could learn more, thus enhancing their “reflective systemic analysis” skills (Warmington et al., 2005, p. 63).

The CHAT framework drew a lot of interest from the participants as they quickly identified with the challenge that is often confronted in organisational practices in cases where the object of an activity is not collectively shared by all involved, directly or indirectly (see Figure 3.7; 3.8). As discussed in Section 3.3 and summarised in 3.7, it was explained to the participants that the framework would assist in the research process in two inter-related ways: as both a methodological and analytical tool; the first relating to the exploratory phase of the research and the second, the expansive learning phase (see 2.3.3.3.3; 3.3.2.1; 3.3.2.2).

*Methodological tool:* Participants were informed of the understanding of Kaptelinin and Nardi (2006, p. 31) when they asserted that CHAT “aims to understand individual human beings, as well as the social entities they compose, in their natural everyday life circumstances, through an analysis of the genesis (history), structure (rules; community; division of labour), and purpose (outcome) of their activities”. I emphasised that what this understanding underpins is the learning that happens through collective activities that are conducted towards a common object (Engeström, 2006; Daniels, 2008). Drawing from Engeström (2008), the DWR concept was explained as a methodological tool which is used within the CHAT framework (see 3.2.1).

*Analytical tool:* I explained that CHAT would assist in the research process with surfacing and exposing tensions and contradictions that existed amongst and within the interacting activity systems in the facilitation of clergy leadership formation in ACSA. This would allow

me to examine the way the participants acted when they engaged, interacted and learnt in developing collaborative working relations as clergy leadership formators in ACSA (Engeström, 2000; Daniels, 2008). I used the transformative ontology as posited by Shields (2009), which is identified with CHAT (as an analytical tool), to introduce the participants to critical realism whose theoretical premise is “to raise consciousness of deep-seated causes of oppression as a strategy for tackling oppression” (Houston, 2001, p. 59). In the context of this study, “oppression” was elaborated as those issues or things which have potential to derail progress in “agential projects” (Archer, 2003, p. 16) or “social entities they (agents) compose in their natural everyday life circumstances” (Kaptelinin & Nardi, 2006, p. 31).

The next substantial task in the session was to facilitate a navigation of the ACSA clergy leadership formation historical landscape with the objective of identifying and highlighting the models which have emerged from inception (1848) to the present time. This was done in observance of the 2<sup>nd</sup> action of the expansive learning cycle (situational analysis) as postulated by Engeström (1999) (refer to 2.3.3.3.3). Essentially, this investigative activity was intended to assist as a basis for establishing the common object between the activity systems represented by the participants at this CLW. I present in the next section how this activity unfolded.

### **6.3.3 Investigating a shared object between activity systems represented at the CLW**

#### ***6.3.3.1 Overview of the historical trends in clergy leadership formation in ACSA***

The history of an institution or establishment is critical to an understanding of how things came to be what they are (*object*) and how expansive learning could be facilitated to enhance current institutional practices (see 1.2.2; 2.3.3.3.3). As discussed in Section 2.3.3.3.1, contradictions are at the heart of what Engeström (2011) calls formative interventions. Further, Engeström emphasises that formative interventions should be “grounded in historical analysis of the activity system” and that empirical manifestations of contradictions in the ongoing activity should be recorded and analysed as part and parcel of the intervention (2011, p. 611). Such an exercise would help to contextualise the contradictions which manifest within, between and across the selected activity systems of the organisation in question, ACSA in the case of this study (see 5.3; 5.4).

The importance of organisational history, in particular the histories of the activity systems involved, is thus underpinned in the above. On this understanding, Engeström reiterates that expansive learning, as a fundamental process of formative interventions, has the potential of transforming practices through what he calls *concept formation* (1987; 2001) which I developed in Table 6.1 on the basis of the data which emerged from the research process (*mirror data*).

In Section 6.2 I discussed the emphasis placed on practitioner and organisation development which happens through agential projects (Archer, 2003; Warmington et al., 2005; Engeström & Sannino, 2010). Further to the discussion, Engeström asserts that “concept formation” is integral to this developmental process which requires multiple agential versions of the concept in question. In normal work practice settings, such deliberative engagements entail agential “confrontation and contestation as well as negotiation and blending” (2011, p. 611; see also explanation of CHAT framework in 2.3; also refer to 5.3; 5.4). Because they are considered useful in framing organisational activities, institution related concepts and their meanings either develop and evolve (transformed) or remain the same (reproduced) with the passage of time (Hall & Greeno, 2008, p. 213; see Bhaskar’s transformational model of human action in 2.2.2.2.1).



In this study, the concept “clergy leadership formation” is fundamental to the work of ACSA from inception as explored and discussed in Section 4.6 and deliberated with research participants through CLWs (see 6.3.1; 6.3.2). The engagements demonstrated that contemporary socio-political dynamics in southern Africa, particularly South Africa, have a bearing on clergy leadership formation models in ACSA. In view of this, Engeström explains that “the key implication of transformation of practice as concept formation is that the analyst needs to trace steps of expansive concept formation, from early unstable attempts and suggestions to stabilisation steps such as naming and modelling” (2011, p. 612). Table 6.1 demonstrates this understanding.

It was on the basis of the above theoretical understanding that I facilitated a “concept formation” introductory session at the first CLW as mentioned in the previous section (6.3.2). The object of the activity was to trace the models which have emerged in the facilitation of clergy leadership formation programmes and activities in ACSA from inception (1848) to date. In observance of the 2<sup>nd</sup> action of the expansive learning cycle (see 2.3.3.3.3), the

information generated would be analysed to establish contradictions encountered in this practice and the probable underlying mechanisms triggering the identified contradictions.

Further, in line with the theoretical framework suggested by Warmington et al. (2005) as explained in Section 6.2, the analysis of the identified contradictions would seek to establish how ACSA, through the “reflective systemic analysis” of facilitators of clergy leadership formation, was able to address the encountered contradictions towards “new forms of professional practice” (p. 63). I used the information which I had gathered from secondary sources during the exploratory phase of the research process as facilitation aids (artefacts) (see Table 3.3). I also used pictures of the different institutions which were used as centres for clergy leadership formation programmes at different points in the history of ACSA. In Section 4.4, I discussed the findings from this investigative enquiry in detail from which I drew the models which I present in Table 6.1 below.

**Table 6.1: Clergy leadership formation models emerging in ACSA from inception (1848)**

<b>EMERGING CLERGY FORMATION MODELS IN CPSA (ACSA) FROM INCEPTION</b>	
<b>1848</b>    <b>1870s</b>	<p><b><u>MISSIONARY MODEL</u></b></p> <p><b>(i) Sporadic model of training of black clergy (informal, uncoordinated training)</b></p> <ul style="list-style-type: none"> <li>• Bishop Gray’s initiative at his residence (1848).</li> <li>• Bishop John Armstrong’s initiative in 1853 (Diocese of Grahamstown).</li> <li>• Bishop Gray’s initiative at opening Zonnebloem College in Cape Town which, in the initial phases of operation catered for the educational needs of the sons of chiefs.</li> </ul> <hr/> <p><b>(ii) Experiential model of clergy training</b></p> <ul style="list-style-type: none"> <li>• Informal, “on the job” type of training. This happened mostly in Mission stations.</li> </ul>
<b>1870s</b>  	<p><b>Formal training of clergy at diocese level (Diocesan schemes)</b></p> <ul style="list-style-type: none"> <li>• Deliberated for the first time at the Synod of Bishops of 1876.</li> <li>• Deliberated further at the Provincial Synod of 1883.</li> <li>• Also agreed was to institute an examining body which would award diplomas and degrees (South African Faculty of Divinity).</li> <li>• <i>The first black clergy person (Peter Masiza) was ordained in 1877.</i></li> </ul> <p><b>Diocesan clergy training schemes included:</b></p> <ul style="list-style-type: none"> <li>• St. Cyprian’s College in the diocese of Bloemfontein which was opened in 1876 – enrolled ordinands from all races and cultural backgrounds provided they met the set requirements.</li> <li>• Clergy training centres in the dioceses of Natal and Zululand: St. Augustine’s College in Zululand (1880); St. Alban’s College in Natal (1882) – which later changed name to St. Vincent’s College in the period 1933-1938.</li> </ul>

1940	<ul style="list-style-type: none"> <li>• St. Bede's College in Umtata was opened in 1898.</li> <li>• Society of the Sacred Mission in the diocese of Bloemfontein was opened in 1902; temporarily closed down in 1955; resuscitated in 1957.</li> <li>• St. Peter's Rosettenville was opened in 1903 in the diocese of Johannesburg.</li> <li>• St. Matthew's College was opened in the diocese of Grahamstown in 1904. Closed down in 1935.</li> </ul>
	<p><b>Formal training of white clergy at Provincial level</b></p> <ul style="list-style-type: none"> <li>• St. Paul's College was opened in 1902.</li> </ul>
	<p><b>Formal training of black clergy at Provincial level</b></p> <ul style="list-style-type: none"> <li>• The matter was discussed for the first time at a Provincial Missionary Conference of 1906.</li> <li>• The matter was discussed further at Training for Native Ministry Conference in 1918.</li> <li>• The matter was resolved at a Provincial Conference of 1933.</li> <li>• In 1938, two theological centres for the training of black clergy in CPSA (ACSA) were recognised: St. Peter's College for the North (diocese of Johannesburg) and St. Bede's College for the South (diocese of St. John, now Umtata).</li> </ul>
<p>1940 ↓ 1960s</p>	<p><i>Clergy training programmes interrupted by war. A number of diocesan training schemes closed down.</i></p>
<p>1960s  ↓  1992</p>	<p><b>Ecumenical model of clergy training</b></p> <ul style="list-style-type: none"> <li>• Formation and existence of the Federal Theological Seminary comprising of Anglican Church (St. Peter's College Rosettenville); Methodist Church; United Congregational Church; and a cluster of Presbyterian churches in the period 1963 - 1992.</li> <li>• Fedsem had an influence on other theological colleges operational in this period (St. Bede's and St. Paul's Colleges) to the extent that St. Paul's College received coloured ordinands in 1976 and blacks in 1979.</li> <li>• In the context of black Consciousness Movement and emphasis of liberation theology, Fedsem created a space for critical reflection on the contemporary socio-political status quo.</li> <li>• <i>First black Archbishop of CPSA (ACSA), Bishop Desmond Tutu, was consecrated in 1986.</i></li> </ul>
<p><b>Cultural and racial integration model of clergy formation in ACSA (1993 – to date)</b></p>	<p><b>(i) Joint Board regulated and monitored theological education programme (1993 - 2006)</b></p> <ul style="list-style-type: none"> <li>• In line with the socio-political developments in South Africa, CPSA (ACSA) amalgamated all her clergy training colleges namely: St. Paul's and St. Bede's to form one theological education and clergy training seminary, College of the Transfiguration (Cott) in Grahamstown.</li> <li>• Alternative forms of theological education include Theological Education by Extension and universities with theological faculties in South Africa such as University of South Africa (Unisa); University of Pretoria; Stellenbosch University; University of Cape Town; University of KwaZulu Natal.</li> <li>• Structural reinforcements: Advisory Board on Theological Education and Ministerial formation (ABoTE); College Council and its committees.</li> </ul>
	<p><b>(ii) ACSA regulated and monitored clergy formation programme (2007 – 2013)</b></p> <ul style="list-style-type: none"> <li>• Transitional period which came with the dissolution of the Joint Board, thus requiring each of its constituent members to be independent in their running of theological education and ministerial programmes.</li> <li>• Structural reinforcements: creation of Training for Ministry (TfM) group; involvement of Hope Africa (para-church organisation).</li> </ul>

	<p><b>(iii) Council on Higher Education (SA) regulated and monitored academic programme (2014 to date)</b></p> <ul style="list-style-type: none"> <li>• Registration and accreditation: compliance with Department of Higher Education and Training legislative requirements through Higher Education Quality Committee on Council of Higher Education (quality of educational programmes offered and suitability of the learning environment).</li> <li>• Compliance with South African Qualification Authority framework (recognition and registration of the educational programmes offered).</li> </ul>
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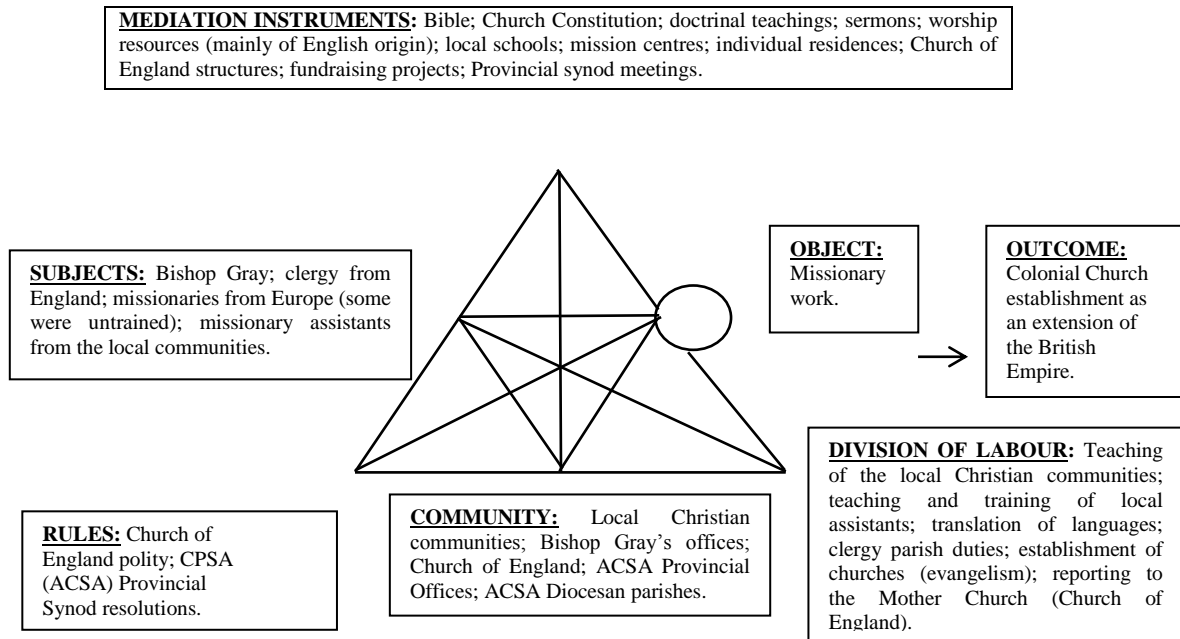
In order to ensure full participation of the participants in observance of the expansive learning cycle 2<sup>nd</sup> action (situational analysis) (Engeström, 1999), I gave the participants a group interactional task in the form of a sub-question drawn from the research questions which guided this chapter (see 6.1) and the content which I had covered in the introductory presentation (see 6.3.2). Particularly, the sub-question was designed on the basis of the CHAT and critical realist frameworks as had been explained to the participants. Feedback from participants was done after a lunch break. The group task was designed as below.

**Box 6.1: Group task for participants at the 1<sup>st</sup> CLW**

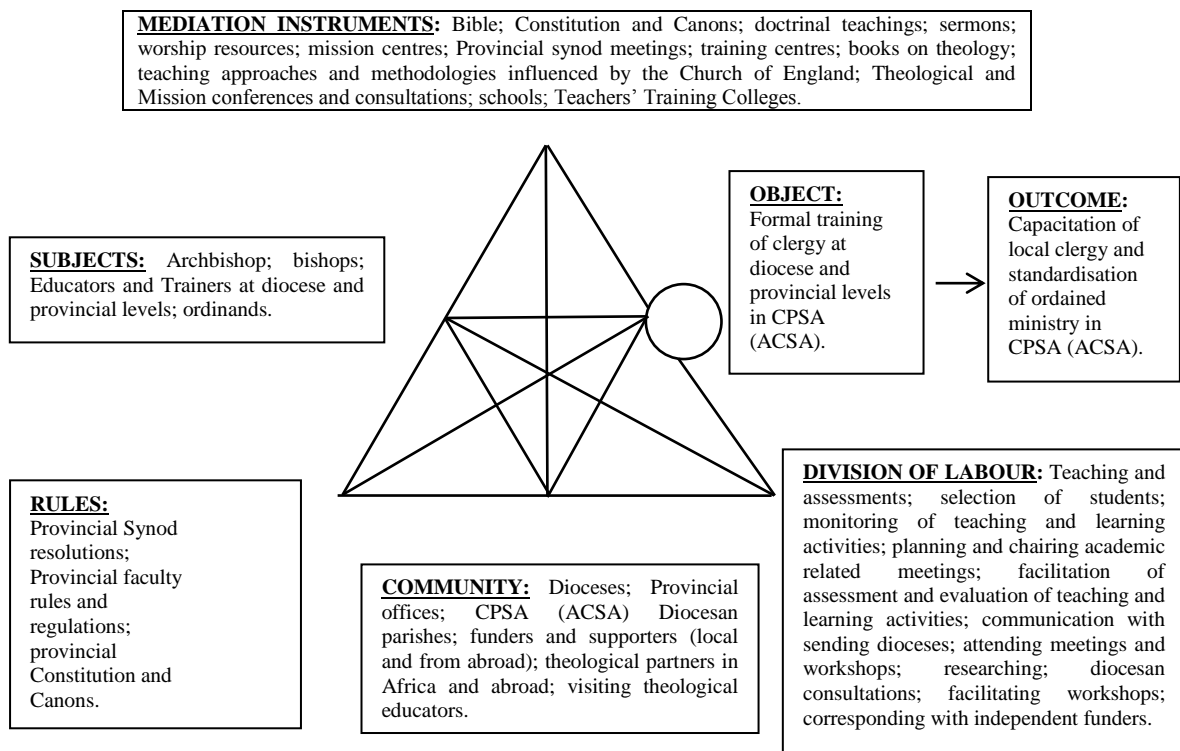
**Do an analysis of Table 6.1 using the CHAT framework** with the understanding that CHAT “*aims to understand individual human beings, as well as the social entities they compose, in their natural everyday life circumstances, through an analysis of the genesis (history), structure (rules; community; division of labour), and purpose (outcome) of their activities*” (Kaptelinin & Nardi, 2006, p. 31).

Responding to the task, participants, with my technical input, gave feedback as follows:

**Introductory statement:** “*Having studied the information (mirror data) availed (as in Table 6.1), we have used the CHAT framework to describe analytically each clergy leadership formation model emerging in CPSA (ACSA) from inception as below*”:

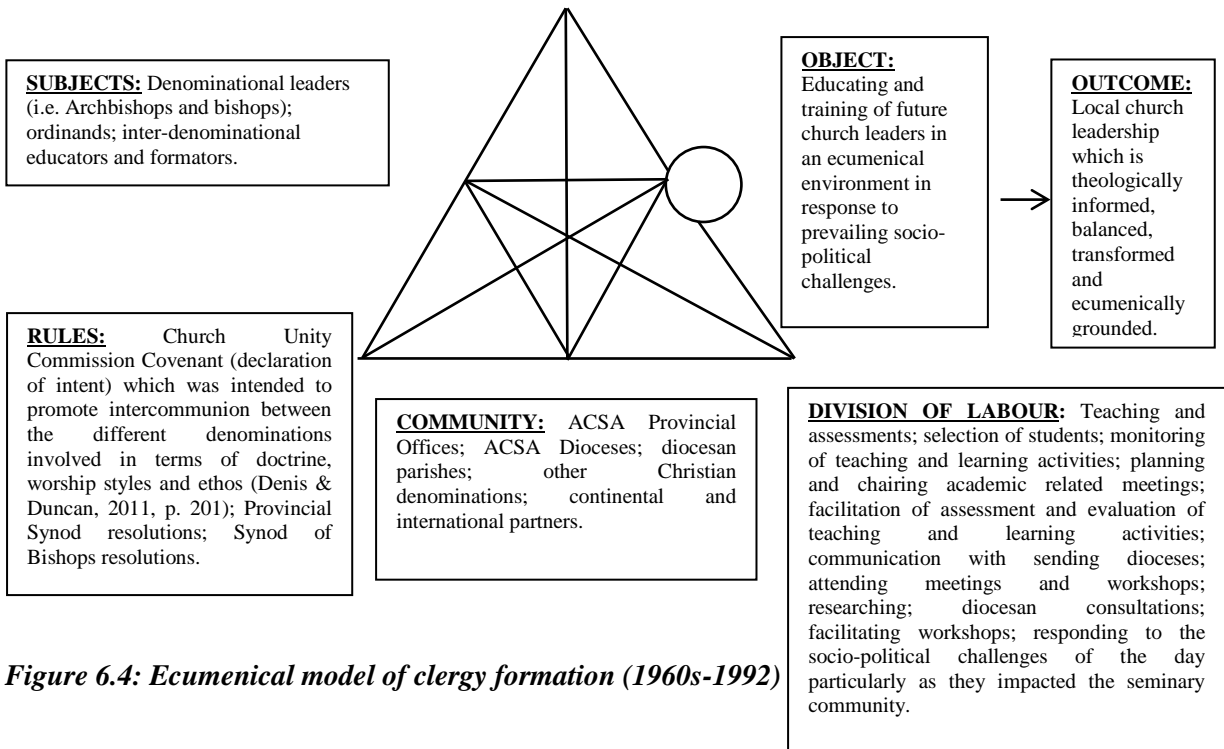


*Figure 6.2: Missionary model (1848 -1870s)*



*Figure 6.3: Formal training model at diocese and provincial levels (1870s - 1940s)*

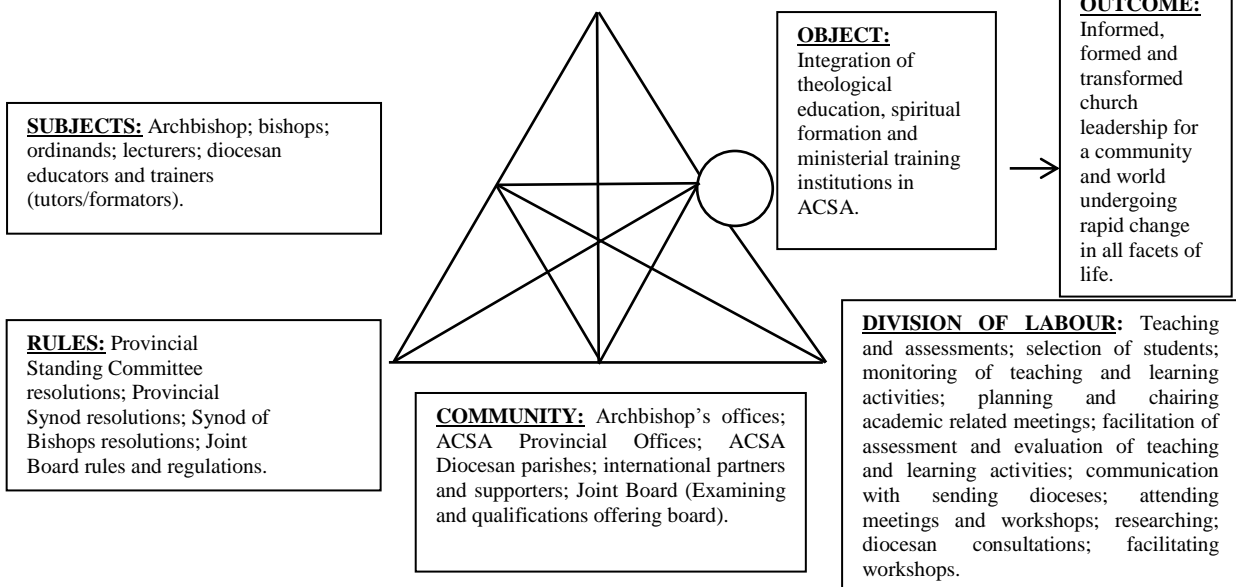
**MEDIATION INSTRUMENTS:** Chapel, hall and classrooms as worship spaces; ecumenical worship opportunities; meetings, debates, task force teams, seminar presentations to deliberate inter-denominational contentious and potentially divisive matters; worship committee; inclusive teaching and learning approaches and methodologies; Declaration of intent; Provincial Synod resolutions; Synod of Bishops resolutions.



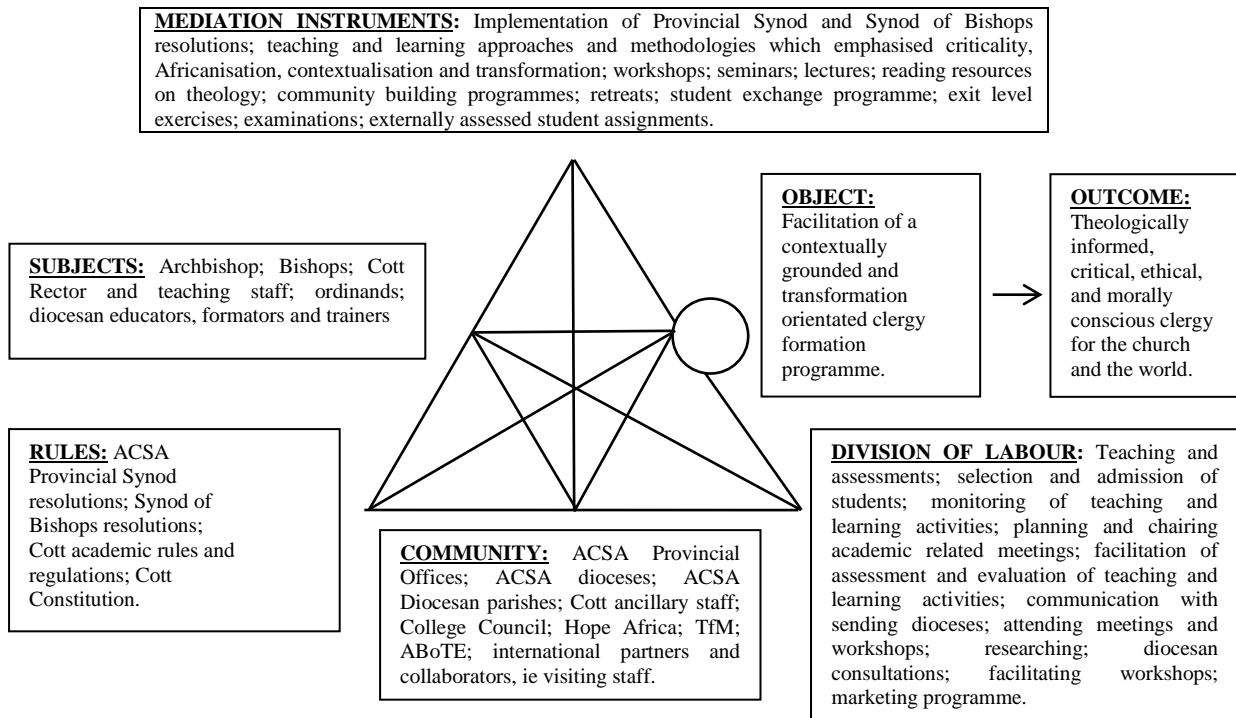
*Figure 6.4: Ecumenical model of clergy formation (1960s-1992)*

**Cultural and racial integration model of clergy formation in ACSA (1993 to date)**

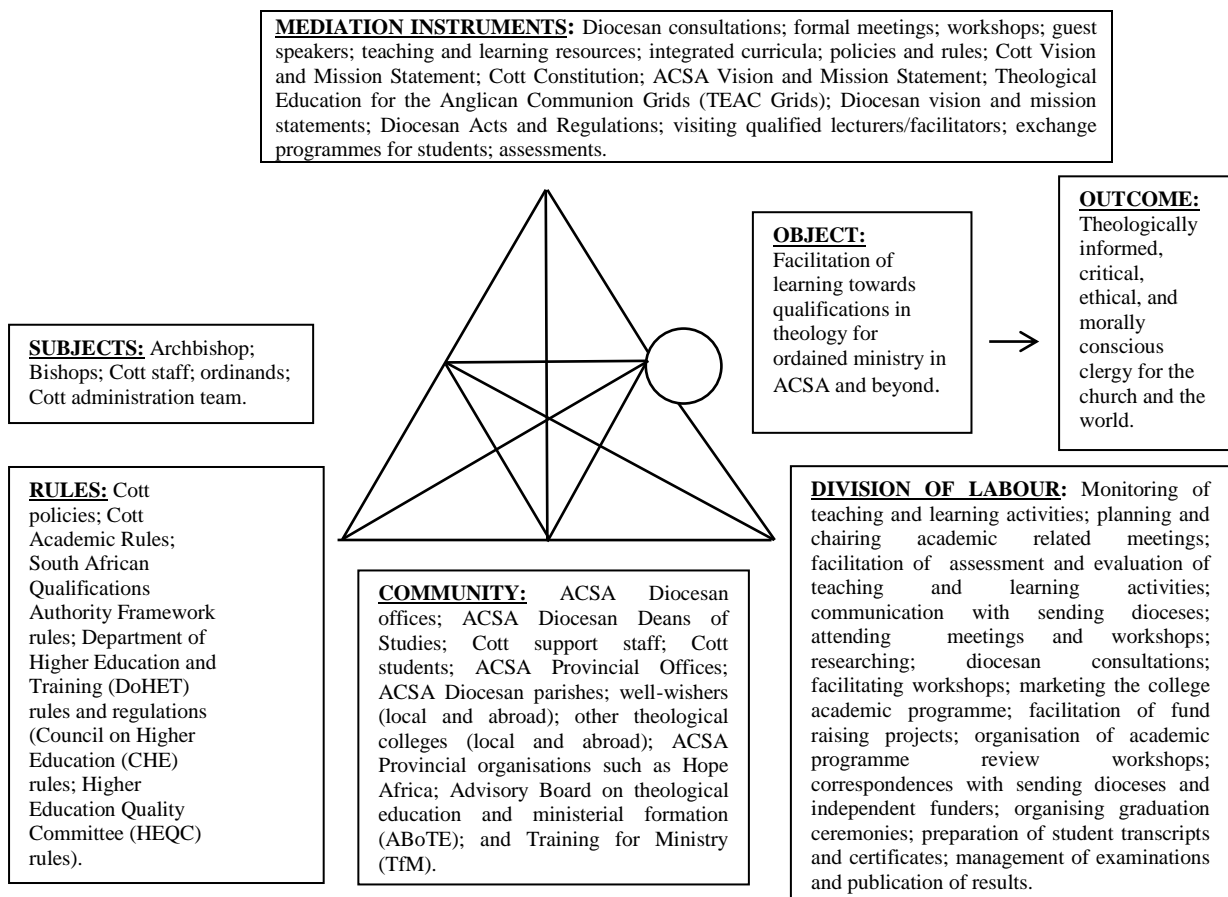
**MEDIATION INSTRUMENTS:** Standing Commission to oversee the process of amalgamation Provincial synod meetings; Synod of Bishops resolutions; utilisation of established infrastructure (St. Paul's College in Grahamstown – now College of Transfiguration; workshops; seminars; sermons; consultations; material resources from each of the colleges; histories of the amalgamated colleges; library; lectures; exchange programme; visiting lecturers.



*Figure 6.5: Joint Board regulated and monitored theological education programme (1993 - 2006)*



**Figure 6.6: ACSA regulated and monitored formation programme (2007 - 2013)**



**Figure 6.7: CHE (SA) regulated and monitored formation programme (2014 to date)**

This facilitation strategy had been designed in the mould of Vygotsky's mediation approach which encourages the use of a variety of artefacts for the purpose of increasing opportunities for participants to work on and think through the task at hand from a diverse perspective. In this regard, Vygotsky (1978, pp. 74-75; see 7.2.2.1 where the mediation approach is elaborated) asserted that:

By using this approach, we do not limit ourselves to the usual method of offering the subjects simple stimuli to which we expect a direct response. Rather, we simultaneously offer a second series of stimuli that have a special function. In this way, we are able to study the process of accomplishing a task by the aid of specific auxiliary means; thus, we are also able to discover the inner structure and development of higher psychological processes.

An indicator of the effectiveness of the selected mediation approach, in line with Vygotsky's assertion as articulated in the quotation above was when participants, in the interactional engagement that had been generated by the feedback given, enquired with me what the titles given to each of the phases of clergy leadership formation in ACSA from 1993 actually implied. I responded to the enquiry by differentiating the three phases of clergy leadership formation in question (see Table 6.1) on the basis of the explanation which I had given about the subject under enquiry in Section 4.6.

Participant contributions were appreciated and acknowledged as pivotal in taking the research process to the next level of engagement which had been planned for the next CLW as highlighted in Table 3.5. Participants were asked to think through the key points which had emerged in the first session in connection with the 2<sup>nd</sup> session which would focus on ascertaining a shared object between the activity systems represented at the CLW. Participants were invited to correspond with me on any issues which they would deem relevant to the subject under investigation in between the CLWs' schedules. Additionally, participants were also reminded of the opportunity to engage me on any issues of interest on the subject in the time that I would have visited selected dioceses for focus group discussions and individual interviews (refer to 6.3.1). Information gathered through these interactions in between CLWs was documented as *mirror data* (refer to 3.4.4.1).

### **6.3.3.2 Summary of the 1<sup>st</sup> CLW session**

Participants showed interest in knowing more about the research theoretical tools which I had introduced and explained to them. I committed myself to expose them to more information on

the concepts beyond the formal interactions. Initially, participants had shown scanty knowledge about the historical trends relating to the facilitation of clergy leadership formation in CPSA (ACSA). However, they had all been able to share information about current trends in the province (ACSA) particularly as practised in their respective dioceses.

The resources and information which I had shared with the participants had enlightened them about the ACSA historical terrain regarding clergy leadership formation which made credible the argument that organisational members would be more effective in doing “reflective systemic analysis” (Engeström, 2011) if they were appropriately informed of the history of the activity or organisation in which they are involved. Thus, Engeström’s postulation that “the key implication of transformation of practice as concept formation is that the analyst needs to trace steps of expansive concept formation from early unstable attempts and suggestions to stabilisation steps such as naming and modelling” (2011, p. 612) had been practically implemented at the 1<sup>st</sup> CLW and would be explored further at the 2<sup>nd</sup> CLW (see 6.3.3.3).

Considered within the CHAT framework (refer to 2.3.3.3.3; Figure 2.8), the 1<sup>st</sup> CLW activity helped to bring the participants to a common ground about the phenomenon under investigation (clergy leadership formation models in CPSA (ACSA) from inception) in terms of awareness of:

- (i) When it all started (history/time)?
- (ii) Who was or is involved and how (subjects; division of labour; community)?
- (iii) What has been or is being used to facilitate the programme activities (artefacts; rules)?

On the basis of the CHAT framework as understood and applied in this research process, the stage had been set up for a deliberation of the object of the activity under investigation. The 2<sup>nd</sup> CLW had been planned for that purpose (refer to Table 3.5).

### ***6.3.3.3 Affirmation of a shared object***

At the 2<sup>nd</sup> CLW I presented participants with brainstorming questions towards identifying a shared object between the activity systems involved in the investigation. I drew clues from the CHAT framework (see 2.3) and critical realist perspective (see 2.2) in designing the brainstorming questions which are as follows:

(i) How has the facilitation of clergy leadership formation in ACSA progressed from the outset?

(ii) What is happening now and why (*status quo of practice and underlying causal mechanisms*)?

(iii) What did not happen and why (*contradictions; double bind*)?

To ensure a more focused discussion, I asked participants to refer to the key issues which had emerged at the 1<sup>st</sup> CLW session regarding the clergy leadership formation models emerging in the history of CPSA (ACSA) from inception. Information which had been recorded on flip chart paper during the 1<sup>st</sup> CLW was made available on the walls for participants to access as they engaged on the tasked brainstorming questions.

Responses to the questions were noted on flipchart paper for analysis to ascertain what could be considered as the preoccupation (*object*) of CPSA (ACSA) (particularly the activity systems represented at the CLW) in the area of clergy leadership formation. What came out very strongly through the participant responses were concerns around understandings of clergy leadership and the exercise of power or lack of it in the life and work of the church, particularly CPSA (ACSA).

Participants agreed that decision-making on models of facilitation of clergy leadership formation in ACSA rested on the vision and mission priorities of the leadership in office at any given point in the life and work of the church, CPSA (ACSA) in the case of this study.<sup>79</sup> Below is a summary of the counter questions and observations which participants raised on the issue<sup>80</sup>:

(i) How might the church use power in transforming, transformational and transformative ways? The goal aimed for in such an enquiry would be authentic liberation, transformation and empowerment of humanity.

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<sup>79</sup> Two words which were emphasised in connection with this observation were *context* and *agency*. In Section 1.6 these concepts are introduced as key in the study. In Chapter Two the concepts are discussed as integral aspects of the theoretical frameworks which inform and guide the study. In Chapter Seven and Eight the concepts are discussed more extensively on the basis of the research findings as presented in Chapter Five and Six.

<sup>80</sup> These participant concerns are critically analysed in Chapter Seven and Eight on the basis of the theoretical premises and methodological frameworks discussed in Chapter Two and Three.

(ii) Who has power in ACSA, at what level, when and why? Who does not have power? In the vein of this enquiry, how might the role of a bishop in the life and work of ACSA be understood? Is it sustainable to attribute absolute power to a bishop?

(iii) Power dynamics are an everyday experience in the ACSA, hence the observation that in some parts of the province (ACSA), there are some dioceses or parishes which operate as independent entities (small kingdoms of their own). This observation aligned with the manner in which ACSA is structured (ecclesiology) and led: ACSA is synodically governed and episcopally led, the former being the superior power structure in ACSA and the latter being the top leadership structure of the province (*bishops*). These structures epitomise hierarchy.

(iv) How is power *given*? Who *gives* power?<sup>81</sup> Do structural artefacts in the practices of ACSA such as Constitution and Canons, Vision and Mission statements, and job descriptions give power to an individual? How relevant in this discourse are other variables such as race, age, experience, academic qualification, and gender?

Overall, participants observed that by its nature, the church, particularly CPSA (ACSA), takes the framework of *family* which would imply the need for the practice of solidarity and unity within and between all its structures. In the case of this study, this implied the need for collaboration between all activity systems in ACSA involved in clergy leadership formation (object). This assertion aligned with the purpose of the study which is to investigate the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA with the ultimate goal of exploring collaborative clergy leadership formation practices (in ACSA) that can be expanded through learning (see 1.3).

Having agreed on a common object between the different activity systems represented at the CLW, the next task was to do an analysis of the contradictions which could be surfaced from the manner in which CPSA (ACSA) had facilitated clergy leadership formation programmes from inception as contained in Table 6.1.

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<sup>81</sup> In Section 2.6 the concept *power* is critically discussed in relation to clergy leadership from the perspective of social theory. In Chapter Seven and Eight the process through which individuals hold positions of power in ACSA is also critically discussed.

### 6.3.4 Analysis of contradictions

The main artefacts which were used in the exercise were the theoretical concepts which had been introduced to the participants at the 1<sup>st</sup> CLW (see 6.3.2); the clergy leadership formation models which had emerged from an investigation of the history of the facilitation of clergy leadership formation in CPSA (ACSA) (see Table 6.1); the critical observations which had been made in the analysis of the 1<sup>st</sup> CLW (see 6.3.3.2); the critical information discussed in Section 6.3.3.3 which had been generated in the process of ascertaining a shared object between the activity systems represented at the CLW; and mirror data which had been gathered during the exploratory phase of the research process (see 3.3.2.1).

Relevant information had been projected on a screen as well as displayed on flipchart paper for participants to refer to in the discussion. Participants were also reminded of the CHAT and critical realist theoretical frameworks which I had introduced and explained as artefacts to use in the analysis of the information at hand (refer to 6.3.2). Drawing from the Expansive Learning Cycle, Action 2 (refer to 2.3.3.3.3), a guiding question in this process had been stated as: *In your opinion, what has contributed to the emergence of different clergy leadership formation models in CPSA (ACSA) from inception?*

Various responses to the question were given by the group and noted on the flip-chart. It was at this point that I exposed the participants to *mirror data* (Table 6.2) on contradictions revealed in and through the information on the facilitation of clergy leadership formation programmes in CPSA (ACSA) from the onset. I had gathered this information from a variety of documents which I had been able to access during the exploratory phase of the research process (see Table 3.1 and 3.3).

Most of the ideas which had been given by the participants in response to the question posed at the CLW had agreed with some of the information (*mirror data*) in Table 6.2 below. For instance, participants spent considerable time brainstorming the implications of the missionary legacy on the facilitation of clergy leadership formation in CPSA (ACSA) particularly considering the almost patronising attitude of the missionaries that characterised their pastoral interactions and working relationships with local Black people. As a result, such an atmosphere created local faithful members of the church who were almost entirely dependent on the missionaries and the Mother Church in England. This was an indication

again of the growing ability to do reflective systemic analysis (Engeström, 2011) in the participants with more involvement at the CLWs.

**Table 6.2: Mirror data: surfacing contradictions in clergy leadership formation models emerging in ACSA from inception (1848)**

EMERGING CLERGY FORMATION MODELS IN ACSA		CONTRADICTIONS AND TENSIONS
1848 – 1870s	<p><b>(1) MISSIONARY MODEL</b></p> <p><b>(i) Sporadic model of training of black clergy. (Uncoordinated)</b></p> <p><b>(ii) Experiential model of clergy training.</b></p>	<ul style="list-style-type: none"> <li>• Prioritisation of denominational territorial expansion and consolidation of church structures such as Constitution and Canons.</li> <li>• Deployment of clergy from Mother Church (England) most of whom had not received formal training.</li> <li>• Diversified spiritualities, with emphasis on Anglo-Catholicism which was mostly incongruent with African forms and expressions of spirituality.</li> <li>• Training of clergy dependant on individuals (missionaries or mission clergy) most of whom had not received formal clergy formation back home (dependency syndrome; patronisation of the faithful black people). However, these could be considered as cases of “a blind person guiding another blind person” (Luke 6:39).</li> <li>• Training was modelled in the framework of the spiritual orientation and personality of the missionary or mission clergy person involved.</li> <li>• This implied manifestations of diverse spiritualities across CPSA (ACSA) at all levels of church practice which, in itself, was not wrong but this being a new experience for the CPSA (ACSA) context, this experience created confusion about what Anglicanism entailed. One of the questions posed was: which understanding and expression of the Anglican church is correct?</li> </ul>
	<p><b>(2) FORMAL TRAINING MODEL</b></p> <p><b>(i) Diocese level (Diocesan schemes)</b></p> <ul style="list-style-type: none"> <li>• Deliberated for the first time at the Synod of Bishops of 1876.</li> <li>• Deliberated further at the Provincial Synod of 1883.</li> <li>• Also agreed was to institute an examining body which would award diplomas and degrees (South African Faculty of Divinity).</li> </ul>	<ul style="list-style-type: none"> <li>• Most dioceses did not have capacity to manage clergy formation schemes, citing in particular lack of staff with requisite qualifications and skills; inconsistent numbers of ordinands which would make planning for and management of these programmes very difficult; difficulties with insisting on residence of ordinands for a sufficient time; and, above all, financial constraints.</li> <li>• <i>The first black clergy person (Peter Masiza) was ordained in 1877 which was a critical indicator of the direction which CPSA (ACSA) was taking and the opportunities and challenges such developments as Peter Masiza’s presented to the church.</i></li> </ul>

<p><b>1870 – 1940s</b></p>	<p><b>(ii) Formal training of white clergy at Provincial level.</b></p> <ul style="list-style-type: none"> <li>Decision to open an all-white residential clergy formation institution in Grahamstown where Webb, formerly bishop of the diocese of Bloemfontein, had relocated to as the next bishop was reached in 1891.</li> <li>St. Paul's College was opened in 1902.</li> </ul> <p><b>(iii) Formal training of black clergy at Provincial level</b></p> <ul style="list-style-type: none"> <li>The matter was discussed for the first time at a Provincial Missionary Conference of 1906.</li> <li>The matter was discussed further at Training for Native Ministry Conference in 1918.</li> <li>The matter was resolved at a Provincial Conference of 1933.</li> <li>In 1938, two theological centres for the training of black clergy in CPISA (ACSA) were recognised: St. Peter's College for the North (diocese of Johannesburg) and St. Bede's College for the South (diocese of St. John, now Umtata).</li> </ul>	<ul style="list-style-type: none"> <li>To start with, St. Paul's was an all-white theological institution which, elaborately, indicated the racial polarisation characteristic of the South African context, church included.</li> <li>St Paul's College opened doors for coloured and black students in the mid-1970's, which makes it +/-75 years later).</li> <li>Role and purpose of church in society came into the spot light because of the mounting socio-political and racial tensions in the South African context.</li> <li>Different Christian formations in South Africa interpreted the gospel message differently, with others using scripture to justify oppression of one race by another.</li> </ul> <hr/> <ul style="list-style-type: none"> <li>Heated debates characterised the discussions on whether black clergy should receive provincial recognition, hence the 27 years between the initial debate and the resolution (1906 – 1933).</li> <li>The agreement which had been reached to recognise the right of any diocese to maintain an existing college or training centre after the resolution on establishing provincial centres had the potential negative effect of some of the dioceses giving little support or no support at all to the introduced provincial centres.</li> <li>The financially less viable dioceses could not afford the cost of sending students to the established provincial formation centres.</li> </ul>
<p><b>1940 – 1960s</b></p>	<p><i>Clergy training programmes interrupted by war. A number of diocesan training schemes were closed down.</i></p>	
<p><b>1960s – 1992</b></p>	<p><b>(3) ECUMENICAL MODEL OF TRAINING</b></p> <ul style="list-style-type: none"> <li>Formation and existence of the Federal Theological Seminary (Fedsem) comprising of Anglican Church (St. Peter's College Rosettenville); Methodist Church; United Congregational Church; and a cluster of Presbyterian churches in the period 1963 - 1993.</li> <li>Fedsem had an influence on other theological colleges operational in this period (St. Bede's and St. Paul's Colleges) to the extent that</li> </ul>	<ul style="list-style-type: none"> <li>operational logistical challenges.</li> <li>Paradoxical environment: a mixture of anxiety, confusion and excitement (optimism) particularly in relation to management logistical issues.</li> <li>In view of the socio-political challenges and developments of the time, churches considered this model as an ideal opportunity for the formation of critical and engaged future church leaders (negative reinforcement).</li> <li>Entrance of women in ministry - this was a challenge to patriarchy and Anglican Church beliefs and practices. The traditional role/authority of a male priest and classical theology were put under scrutiny.</li> <li>Formation environment characterised with deep suspicion of one another particularly on the grounds of tribe (culture); political affiliation; race.</li> </ul>

	<p>St. Paul's College received coloured ordinands in 1976 and blacks in 1979.</p> <ul style="list-style-type: none"> <li>In the context of Black Consciousness Movement and emphasis of liberation Theology, Fedsem created a space for critical reflection on the contemporary socio-political status quo.</li> </ul>	
<p><b>1993 to date</b></p>	<p><b>(4) CULTURAL AND RACIAL INTEGRATION MODEL</b></p> <p><b>(i) Joint Board regulated and monitored theological education programme (1993 - 2006)</b></p> <ul style="list-style-type: none"> <li>In line with the socio-political developments in South Africa, CPSA (ACSA) amalgamated all her clergy training colleges namely: St. Paul's; St. Bede's; St. Peter's and Lapa laJesu to form one theological education and clergy training seminary, College of the Transfiguration (Cott) in Grahamstown.</li> <li>Alternative forms of theological education included Theological Education by Extension (TEE) and universities with theological faculties in South Africa such as University of South Africa (Unisa); University of Pretoria; Stellenbosch University; University of Cape Town; University of KwaZulu Natal.</li> <li>Structural reinforcements to bolster governance and management needs of the college included Advisory Board on Theological Education and Ministerial formation (ABoTE); College Council and its committees.</li> </ul>	<ul style="list-style-type: none"> <li>Transitional challenges which basically emanated from the difficulty of accepting and embracing change under the difficult circumstances' characteristic of the broader socio-political context of the day.</li> <li>Practical integration challenges included difficulties to accept and work with new leadership (particularly on the side of white students); adjusting to a new formation environment (especially on the side of the students from St. Bede's; St. Peter's; and Lapa laJesu colleges).</li> <li>Some dioceses maintained local training schemes which resulted in dwindling support for College of the Transfiguration. As a result, enrolment figures have been and continue to be a cause for concern almost every year from then.</li> <li>Decline in the number of white students enrolled at Cott became noticeable over the years to an extent that, currently, there is not a single white student at Cott even though a number of white people are being ordained every year in some parts of ACSA having done theological education with TEE or secular universities which can only cater for the academic side of the formation of the student.</li> </ul>
	<p><b>(ii) ACSA regulated and monitored clergy formation programme (2007 – 2013)</b></p> <ul style="list-style-type: none"> <li>Transitional period which came with the dissolution of</li> </ul>	<ul style="list-style-type: none"> <li>Due to the dissolution of Joint Board and the requirement to seek accreditation of the College qualifications with CHE and SAQA, Cott could not offer accredited qualifications in the interim.</li> <li>As a result, enrolment figures became more unstable than before</li> </ul>

	<p>Joint Board, thus requiring each of its constituent members to be independent in their running of theological education and ministerial programmes.</p> <ul style="list-style-type: none"> <li>• Structural reinforcements: creation of Training for Ministry (TfM) group; involvement of Hope Africa (para-church organisation).</li> </ul>	<p>as dioceses found it difficult to send students to the College who would not come out with a universally recognised qualification, especially the more able ones who might have been considered for further studies with other recognised theological institutions.</p> <ul style="list-style-type: none"> <li>• Linked to the above, most dioceses, as a result, sent less able students to Cott who would benefit formation wise anyway.</li> </ul>
	<p><b>(iii) Council on Higher Education (SA) regulated and monitored academic programme (2014 to date)</b></p> <ul style="list-style-type: none"> <li>• Registration and accreditation: compliance with Department of Higher Education and Training legislative requirements through Higher Education Quality Committee on Council of Higher Education (quality of educational programmes offered and suitability of the learning environment).</li> <li>• Compliance with South African Qualification Authority framework (recognition and registration of the educational programmes offered).</li> </ul>	<ul style="list-style-type: none"> <li>• Operational challenges: difficulties in efforts to balance Cott leadership formation activities comprising theological education, spiritual and ministerial formation (see 1.2). The Cott formation programme has been criticised as being too academic at the expense of spiritual and ministerial formation.</li> <li>• Contradictions between main activity systems in ACSA leadership formation which include Cott, TfM, ABoTE and Hope Africa (Chapter Five).</li> <li>• High turnover of academic staff just when teaching of the provisionally accredited qualification had started. This meant the need for comprehensive induction of new teaching staff and, coincidentally, Rector and Registrar.</li> </ul>

The CLW session adjourned at this point until the following day in the same time slot.

### 6.3.5 Summary of 2<sup>nd</sup> CLW

Engeström’s (2007, p. 370) assertion that the idea with CLWs “is to arrange a set of representational tools available for analysis of disturbances or for constructing new models of the work activity” was foundational in informing and guiding me in the interactions with the participants as an interventionist researcher<sup>82</sup>. For instance, the design of brainstorming and probing questions and consistent reference to and application of theoretical tools which had

<sup>82</sup> In Section 7.3 I discuss critically my role as an interventionist in the research process.

been introduced at the 1<sup>st</sup> CLW had significant influence on participant engagement on the subject of investigation. In this regard, as an example, participants enquired the basis of the differentiation of the models which fall under *cultural and racial integration model* in Table 6.2. My response to the enquiry had been guided by the historical information which I had gathered during the exploratory phase of the research process (refer to 4.4).

Two other points of interest observable in the participant interactions in this activity concerned where participants were coming from (geographical location in ACSA) and age differences between them, thus implying differences in experience of clergy leadership practice in the work and life of the church, ACSA in this case. For instance, in the ensuing discussions participants could be heard making statements such as: “*Guys, this does not apply in my diocese ... we do things differently*”; or “*I can tell you that if you had been around in the 1960s, you would have experienced things differently*”. I discuss these observations more critically in Chapter Seven and Eight particularly as they relate to the conceptualisations of learning which are discussed and applied in the study and the methodological frameworks which guide the research process.

### **6.3.6 Facilitation of the 3<sup>rd</sup> CLW**

The 3<sup>rd</sup> CLW had a two-fold objective: reconceptualisation of the object of the research activity; and developing model solutions to the contradictions surfaced in the research process and critique them.

#### ***6.3.6.1 Reconceptualising the object***

The purpose of reconceptualising the object of an activity in the CHAT framework (Engeström, 2007; 2011) is to question current understandings and practices with the objective of unveiling invisible dynamics which might be causal to what is observable in the practices of an activity system, ACSA in the case of this study. On the basis of this understanding and guided by the critical realist articulation in Box 6.2 below, I tasked the participants to do a deepened analysis of the responses which they had given in response to the discussion task which had been given in 6.3.4 in relation to the *mirror data* in Table 6.2.

**Box 6.2: Group task for participants at the 3<sup>rd</sup> CLW**

Analysis of information in Table 6.2 using critical realism whose theoretical premise is “to raise consciousness of deep-seated causes of oppression as a strategy for tackling oppression” (Houston, 2001, p. 59).

In the context of this study, I explained “oppression” as implying those things or factors which stand in the way of facilitators of clergy leadership formation as they work towards specified goals and objectives. In relation to CHAT as used in the study, participants were advised that the term “oppression” could imply conflicts or ruptures (manifestations of contradictions) experienced in activity systems (refer to 2.3; Chapter Five).

The outcomes of the discussions revealed the following distinct categories as possible sources of contradictions in the emerging clergy leadership formation models in ACSA from inception (Table 6.2):

*6.3.6.1.1 Historical factor*

The origins and growth of CPSA (ACSA) were influenced by the socio-political developments happening, in the first instance, in Europe and from about the 1860s<sup>83</sup>, southern Africa (refer to 4.2.4; 4.3; 4.4). This brings to the fore one of the key issues emphasised in this study which is the observation that practice of clergy leadership is not divorced from contextual realities within and without the boundaries of the church (refer to 4.2; 4.3; 4.4). It is evidenced that it was on the basis of this understanding that the leader of ACSA at the time when this study was done, Archbishop Thabo Makgoba, pronounced that clergy in ACSA were expected to “serve the wider community (beyond church boundaries) including business, government, and other parts of society that seek moral, ethical, and spiritual direction in dealing with injustice and inequality” (*Archbishop Thabo Makgoba in a report on development of ACSA Vision and Mission Statement, September 2010*). In Chapter Eight, this understanding is explored further as the embodied model of clergy leadership formation.

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<sup>83</sup> This estimation is made on the basis of the information which was gathered in the investigation of the clergy leadership formation models which have emerged in ACSA from inception (1848) (refer to Table 6.1).

#### *6.3.6.1.2 Agency and structure*

Individual churchmanship or individual spirituality emerges as a critical aspect of clergy leadership practice in CPSA (ACSA). This has a bearing on understandings of how clergy leadership formation programmes and activities should be organised and facilitated (refer to 4.3.2; Table 5.1; 5.3; Chapter Eight).

#### *6.3.6.1.3 Contextual cultural and religious dynamics*

Cultural and indigenous religious practices and observances in southern Africa have had an impact on CPSA (ACSA) in terms of denominational practices and facilitation of clergy leadership formation. Aspects of the cultural practices implied include local languages, traditional rituals, and norms and values about life of indigenous people. Indigenous religious practices include African traditional religious beliefs and rituals as well as those of other Christian denominations.

#### *6.3.6.1.4 Criticality of formation of clergy leaders*

There is enough evidence from the data gathered (see Table 6.1) to support the observation that CPSA (ACSA) has been intent on educating and training selected people for the responsibility of clergy leadership. However, the antithesis underlying this observation is that, for a long time, the changes in the clergy leadership formation models have always advantaged certain groups of people over others, despite the fact that this was happening in the context of the church which not only preaches love and equality of all and that everyone is created in the image of God, but was intent on teaching and growing followers of all races from all nations (refer to 4.2). The interest in the study to interrogate the understanding(s) of church as *family* relates to this critical observation emerging from CLW interactions and *mirror data* (refer to Chapter Eight).

#### *6.3.6.1.5 Church growth*

CPSA (ACSA) has expanded doctrinally (teaching), numerically and geographically which has had implications on selection and utilisation of relevant methodologies and approaches in the facilitation of clergy leadership formation programmes. The emergence of a variety of clergy leadership formation models in CPSA (ACSA) is evidence of the contradictions which

have characterised programmes and activities related to this organisational practice (refer to 4.2; see Table 6.1; 6.2).

The CLW discussion had, to this point in time, covered the expectations of one of the research questions which guided this chapter which is: *What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?*

### **6.3.6.2 Solution modelling**

The next exercise was to respond to the other question which guided this chapter which is: *What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?* The task was approached with a firm acknowledgement of the potential for expansion of some of the clergy leadership formation practices in ACSA which had been illuminated through an analysis of surfaced contradictions (refer to 5.3.1; 6.3.4). Within Engeström's (2008) solution, modelling is attempted by agents who would have been empowered with the requisite knowledge and skills for the activity at hand. In the case of this study, participants (clergy leadership formators in ACSA) involved at the CLW had been prepared adequately to attempt working towards developing solutions for the contradictions which had been revealed within the ACSA clergy leadership formation programmes and activities (see 6.3.4).

Again, in observance of the advice given by Vygotsky (1978) as explained and applied in Section 6.3.3.1, I organised the solution modelling activity in the form of group work. I divided the group into two and assigned them the following sub-questions drawn from the research question mentioned above:

- (1) In what ways have the changes in clergy leadership formation models in ACSA impacted clergy leadership practices in your diocese and ACSA in general?
- (2) What do you think could be done to enhance current clergy leadership formation practices in ACSA?

Feedback from groups was given as below:

**Table 6.3: 3<sup>rd</sup> CLW participant responses to tasks on clergy leadership formation models in ACSA**

QUESTIONS	COMMON RESPONSES	OTHER RESPONSES
<p><i>In what ways have the changes in clergy leadership formation models in ACSA (as presented in Table 6.1 &amp; 6.2) impacted clergy leadership practice in your diocese and ACSA at large?</i></p>	<ul style="list-style-type: none"> <li>• Inclusive ministries now emphasised in clergy leadership (regardless of gender, age, race, nationality, educational status).</li> <li>• Most dioceses now ordaining women. However, this has remained an area of on-going concern in ACSA.</li> <li>• More young people now joining the ordained ministry.</li> <li>• Formal training of clergy leaders is emphasised more. ACSA has a bursary facility for support of clergy who qualify to do further studies in theological education.</li> <li>• More people are studying theology (particularly through distance learning (TEEC), not necessarily for ordination purposes but for knowledge, spiritual growth and informed contribution to the work and life of the church, ACSA in this case.</li> <li>• Strengthening of theological education and ministerial formation structures in most dioceses and at provincial level.</li> <li>• Increasing participation by dioceses in ACSA in inter-diocesan workshops and consultations (TfM consultations).</li> <li>• Growing participation in ACSA clergy leadership formation programmes.</li> <li>• Some dioceses have been consistent in sending students to College of the Transfiguration.</li> <li>• Provincial Office unwavering support for Cott.</li> </ul>	<ul style="list-style-type: none"> <li>• College of the Transfiguration, the only residential seminary in ACSA, is not receiving full support of most dioceses as the majority opt to use other forms of clergy leadership formation, particularly distance learning.</li> <li>• Financial and spiritual support to College of the Transfiguration remains an on-going concern.</li> <li>• Women now considered for high positions of responsibility (even though few currently).</li> <li>• Encouraging responses to current socio-political and economic issues (prophetic ministries).</li> </ul>
<p><i>What do you think could be done to enhance current clergy leadership formation practices in ACSA?</i></p>	<ul style="list-style-type: none"> <li>• Increased collaborative practices between dioceses and organisations involved in clergy leadership formation programmes and activities in ACSA (involving Cott, TfM, Hope Africa, ABoTE).</li> <li>• More clergy exposure to different ministerial contexts in ACSA and abroad. ACSA has diverse contexts suitable for that need.</li> <li>• Increased financial and spiritual support for College of the Transfiguration by ACSA as a whole.</li> <li>• Problematised understandings of clergy leadership in all clergy leadership formation deliberations, practices, programmes and activities in ACSA. This sits at the core of the challenges (contradictions) faced (surfaced) in clergy leadership in ACSA.</li> <li>• Reinforce continuing ministerial education and spiritual formation programmes at diocese and provincial levels.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to institute an office for a Provincial Dean of Studies.</li> <li>• More consideration of young people and women in the ordained ministry.</li> <li>• More teaching needed in ACSA about the importance of theological education and spiritual formation.</li> <li>• Reinforcement of practical theology; contextual application of theology in the work and life of church leaders.</li> <li>• Offering of short courses on critical aspects of ministry such as conflict</li> </ul>

		management.
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Participant responses highlighted evidenced collaborative practices in clergy leadership formation programmes and activities in ACSA with potential for enhancement.

Concluding the session, participants observed and agreed unanimously that the root of all the contradictions in clergy leadership formation programmes and activities in ACSA that had been revealed and analysed (Tables 6.1, 6.2, 6.3) was located in the leadership model(s) observed and practised by the top provincial structures and leaders at any given time in the work and life of ACSA (refer to 4.6; Chapter Seven and Eight).<sup>84</sup> Accordingly, it was noted that proposals and attempts to enhance evidenced collaborative and transforming practices in ACSA clergy leadership formation programmes and activities (as in Table 6.3) would be futile if the top provincial leadership structures were not brought on board and engaged in ways that would challenge them to reconsider their leadership practices. It was for this reason that the participant response relating to this matter in Table 6.3 was highlighted.

The CLW participants, as part of the ACSA ministry and training group (TfM) which had been in consultation on the topic *MORAL AND SPIRITUAL LEADERSHIP FOR MINISTRY IN A DIVERSIFIED CONTEXT* on this occasion, **reached** a resolution to draft a request statement for the attention of the top leadership of ACSA which read as below:

**Box 6.3: Resolution statement extracted from ACSA ministry and training case study minutes 2016**

**Recommendation to the Archbishop to set up a commission to organise a provincial platform to:**

1. Discuss the models of church that are relevant for the 21<sup>st</sup> century, particularly in the context of ACSA.
2. Deliberate the theological assessment of bishops and the role of bishops in ACSA.
3. Discuss how the church (ACSA) can be more missional in context.

It was agreed that the outcomes of this engagement would be informed of the participants before or at their next consultation.

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<sup>84</sup> Such claims about clergy leadership practices in ACSA are interrogated in Chapter Seven and Eight.

### 6.3.6.3 Feedback on request made to the Archbishop

The matter had been returned to TfM to deliberate at their following consultation. Whatever resolutions would be reached on the matter would be communicated to ACSA leadership (bishops and Archbishop) through the Liaison Bishop who was the Chairperson of ABoTE and a participant at the TfM consultations (see Figure 5.9). A key note paper on the subject had been presented by one of the lecturers at Cott with the title: “*The Bishop under Authority*”. The paper highlighted the following key points on the subject:

- (1) Bishops are entrusted authority by fellow Bishops and the church at large.
- (2) The authority entrusted on a bishop is currently misunderstood in the practices of the majority of bishops in ACSA.
- (3) Ultimately, the authority entrusted on a bishop derives from God through Jesus Christ.
- (4) The bishop is entrusted with the responsibilities of being an abler to the church and individuals under one’s care for the one goal of advancing God’s mission on earth.

Several other presentations on the subject were done during this consultation whose key points I summarise below:

**CONSULTATION TOPIC: THE ANGLICAN CHURCH IS SYNODICALLY GOVERNED AND EPISCOPALLY LED: WHAT ARE THE DYNAMICS AND IMPLICATIONS OF THIS FOR THE CHURCH IN THE 21<sup>ST</sup> CENTURY?**

<b>EMERGING KEY ISSUES FROM THE PARTICIPANTS</b>	
<b>WHAT A BISHOP IN ACSA SHOULD BE.</b>	<b>WHAT A BISHOP IN ACSA SHOULD NOT BE.</b>
<ul style="list-style-type: none"> <li>• Deeply spiritual: pastoral, prayerful, contemplative.</li> <li>• Humble, humorous, available and approachable.</li> <li>• Lean – no unnecessary administrative posts; accountable;</li> <li>• E-savvy – knowledgeable of technology.</li> <li>• Initiator of conversations which promote the work and life of the Church.</li> <li>• Teacher of the faith; effective communicator.</li> <li>• Knowledgeable of Anglicanism and Church traditions.</li> <li>• Open to learning and thus shepherd God’s people in informed and appropriate ways.</li> </ul>	<ul style="list-style-type: none"> <li>• Should not defend power but teach to empower.</li> <li>• Should not show favouritism.</li> <li>• Should not allow the diary to dominate the responsibility of giving pastoral support to clergy.</li> <li>• Should not be enslaved by the arrogance of certainty.</li> <li>• Should not be inclined to demand privileges.</li> </ul>

**Table 6.4: Participant views on the attributes of an ideal bishop in ACSA**

The consultation was concluded with an undertaking by the Liaison Bishop that he would communicate the outcomes of the deliberations on the subject matter to fellow bishops and the Archbishop at an appropriate time before the next TfM consultation. Thereafter, ACSA ministry and training case study participants, who are also members of TfM, would consider how to rationalise the subject matter in relation to their responsibilities as facilitators of clergy leadership formation in ACSA.

### **6.3.7 Conclusion on ACSA ministry and training expansive learning process**

An analysis of participant input at the CLWs which were facilitated during the research process, in comparison with *mirror data*, suggested that the object of the ACSA ministry and training case study was a quest to unravel understandings about clergy leadership and the exercise of power or lack of it in decision making on the subject. The findings suggested that power dynamics in ACSA and the broader southern African socio-political environment, particularly South Africa, had a bearing on the clergy leadership formation models used at different points in the history of ACSA (see Tables 6.1; 6.2). Through CLWs, participants were ably empowered with theoretical tools to question the *status quo* towards expansive learning on the subject matter. Participant deliberations culminated in engagements with ACSA leadership on the subject matter, thus creating possibilities of organisational transformation.

## **6.4 EXPANSIVE LEARNING IN THE COTT CASE STUDY**

### **6.4.1 Background information**

As explained in Section 3.2.3, three activity systems constituted the Cott case study. These were Cott formation activity system, Cott management activity system, and Cott experiential learning activity system. In Section 3.4.3 I explained that the Cott case study expansive learning programme was organised alongside on-going change orientated organisational programmes. To start with, a new Rector (Principal) had been appointed a year after the study had started. This required me to re-negotiate with the new leadership on how the research would continue in the organisation. Fortunately, I had been granted permission to continue with the research as had been agreed with the previous Rector. However, in view of the organisational activities which were in progress at the time the research data was gathered, it was necessary to be strategic in how I was going to organise CLWs for the purposes of my research.

A significant organisational programme which coincided with the data collection programme of the study was a curriculum review process which Cott was required to do in fulfilment of the requirements of DoHET (refer to 3.4.3). By its nature, this was an expansive learning programme even though the organisation would not have used such language which is peculiar to this study. I negotiated with the leadership and management of the College on how my research programme, with almost similar objectives as the curriculum review process, would be accommodated.

It was agreed that I would facilitate a parallel programme (CLWs) with selected academic and management staff (refer to 3.4) on the understanding that those activities (CLWs) would empower organisational members involved with expansive learning knowledge and skills which they would be expected to take to the mainstream organisational activity (curriculum review). Additionally, the College management indicated that they would greatly appreciate it if the recommendations which would be made in the study would help to reinforce the role of Cott in the formation of clergy leadership in ACSA.

#### **6.4.2 Preparatory expansive learning interactions**

I did a presentation on the nature of study that I had embarked on to the Cott academic and management staff prior to the curriculum review related activities. In the same way that I had introduced the study to the ACSA ministry and training case study participants (see 6.3.2), I exposed the Cott case study participants to the conceptual and theoretical tools which framed the study.

In addition, taking full recognition of the fact that this particular expansive learning process was happening in a learning institution, I drew theoretical perspectives from Edwards' (2007) three-legged conceptualisation of learning within the CHAT framework as discussed in Section 2.3.2. A similar presentation had also been done to a group of students (Figure 6. 7) who, as had been advised by the College management, would be involved in some of the curriculum review activities as they were an interested organisational group in the process.



**Figure 6.8: Research discussion with Cott students**

In response to the information which I had presented, Cott management and academic staff participants enquired on a number of issues relating to the nature and focus of the study. Firstly, it was an enquiry on the suitability of the critical realist approach in a study done in the context of the church. The concern had been that church by its nature, unlike secular organisations, is not business-like which makes it very difficult to draw distinct lines about the manner in which it functions. For instance, the hierarchy of power recognised by the church has God occupying the highest level of power structures. Such an understanding would have critical implications on the application of the critical realist approach on a study whose interest was to investigate the clergy leadership formation models used in ACSA to prepare people called to the ordained ministry.

I responded to the participant observation by emphasising that the critical realist approach would be used as an under-labourer of the CHAT framework as had been explained in the presentation. Emphasis had been placed on how the two theoretical tools complemented each other (refer to Table 2.1 - *Research conceptual framework alignment*).

Secondly, in relation to the first concern, participants understood structure in the work and life of the church (ACSA) as triple-fold: the lower level, the upper level, and the nurturing dimension.

- The lower level related to policies, constitutions, Canons, Acts and other governance artefacts used on a day to day basis in the church (see Figure 5.8).

- The upper level related to church doctrine (the teachings of the church). In the participants' understanding, this level took precedence over the lower level.
- The nurturing dimension referred to the intentional and methodical preparation of people for different responsibilities in the life and work of the church (ACSA particularly) in line with the prescriptions of the doctrinal and structural frameworks as explained above. This understanding has affinities with the usage of the concept *formation* in this study.

Drawing from the CHAT framework as discussed in Section 2.3, I emphasised that the study, in the first instance, had an interest in what was done (*activities*) and used (*artefacts*) in the facilitation of clergy leadership formation programmes in ACSA (*object*). In the second instance, the study, on the basis of the critical realist approach as had been explained, aimed at interrogating why ACSA was structured in the manner that it was in the task of clergy leadership formation with the objective of transforming the obtaining organisational *status quo* (*outcome*).

The concern which student participants had raised had an interest in the concept *formation* in view of the understanding which I had presented to them (refer to 1.2.2). Their argument had been that it would be easier to engage on issues related to clergy leadership formation in ACSA if one understood what the concept *formation* meant in the context of its usage. Students had shared their personal experiences, agreeing amongst themselves that it was difficult to be certain that one would have been *formed* after a certain period of time in formation for ordained ministries discernment loop, particularly during and after their time at Cott. This brought into perspective the investigation of the role of Cott in ACSA clergy leadership formation.

In response to the concern of the students, I had explained the understanding of the concept in question on the basis of how it was understood and used in this study as explained in section 1.2.2. Beyond the official discussion sessions, I had corresponded electronically with the student participants, giving them more explanations of what would have been discussed at CLWs regarding the concept (*formation*) and its broader context, facilitation of clergy leadership formation in ACSA.

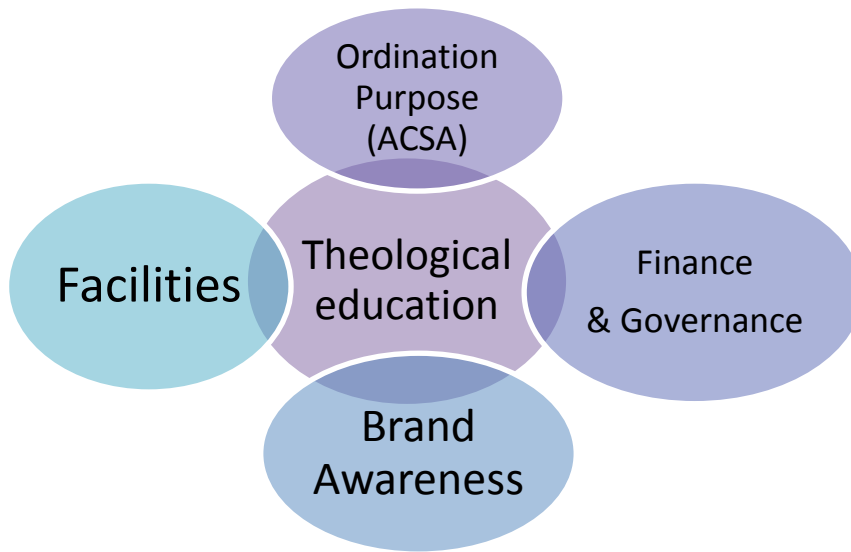
There is an in-depth discussions of participant views on the critical aspects of the study in Chapter Seven and Eight.

### 6.4.3 Investigation of a shared object between Cott activity systems

The process had started with a review of the College Vision and Mission statement in view of the developments which had happened at the College in the period that the statement under review had been the basis of life and work at the College. The review also took into consideration future developmental prospects for the organisation.

At the heart of the Vision and Mission statement framework under discussion (Figure 6.7) was theological education which, in its broader sense as understood in ACSA, encompasses academic, spiritual and ministerial formation (refer to section 1.2.2). In the context of the College, what that meant was that the content of the other College activity systems (*Cott experiential learning activity system; Cott management activity system*) would be determined by what was emphasised in the theological education programme of the College (*Cott formation activity system*). In the language used in the study, this *status quo* qualified the Cott formation activity system as the central organisational activity system (see Figure 5.2). Therefore, facilitation and management of theological education activities at the College emerged as the common object between the different activity systems constituting the Cott case study.

The background information above serves to contextualise the curriculum review exercise which Cott embarked on in the period that this research was conducted. Figure 6.7 below captures the conclusions which were reached on what needed to be emphasised in the Cott Vision and Mission statement henceforth. The conclusions were reached on the understanding that Cott needed “*to empower staff and students to be contributors of social change and social cohesion; seek to discern God’s will through a theological reflection method within the Anglican Church of Southern Africa (ACSA) so as to grow a discipleship of quality*” (Drawn from the minutes of the Cott Vision and Mission statement review process).



*Figure 6.9: Cott Vision and Mission statement review framework*

#### **6.4.4 Facilitation of 1<sup>st</sup> Cott CLW**

As had been agreed with the institutional leadership, I organised a CLW with selected members of the Cott academic and management prior to the curriculum review process. I explained to the participants that the discussion would take into consideration the deliberations which had been done and the resolutions which had been agreed to in the Cott Vision and Mission statement process as presented in the previous section. In line with the transformative ontology posited by Shields (2009) and Houston (2001), within the expansive learning cycle conceptualisation (Engeström, 1999) as discussed in section 6.3.2, I challenged the participants to the following questions:

- (1) What is your understanding (individual and collective) of curriculum? (*conceptualisation of subject matter*).
- (2) What is your experience of curriculum design, implementation, assessment and evaluation at Cott? (*Status quo of practice – why were things the way they were? What were the underlying mechanisms for the generation of the status quo?*)
- (3) How might curriculum be enhanced at Cott? (*transformation of practice; expansive learning*).

After an hour of discussion, the group gave feedback on the views that had emerged in the discussion. There had not been consensus on some of the points between individual participants. I noted down the key issues which had been emphasised in the feedback and subsequent discussion of the issues, also highlighting those issues which had received diverse opinion from the participants. I summarise below the issues which had been emphasised in the session in the order of the questions which had been asked.

***(1) What is your understanding (individual and collective) of curriculum?***

(i) Curriculum is set (put together) to be followed *religiously*.

(ii) Each institution has its own way(s) of designing, implementing, assessing and evaluating curriculum.

(iii) The responsibility of facilitators of curriculum implementation is “to put a cloud in the minds of the students so that they can go and rain it out there.” *[This was a hotly debated opinion particularly when considered from a utilitarian perspective which sharply contradicts the understanding of the concept “formation” as used in the study].*

***(2) What is your experience of curriculum design, implementation, assessment and evaluation at Cott?***

(i) Learners have minimal input in the design, management, quality assurance and evaluation of the curriculum. Students do official evaluation of teaching and learning processes in mid-year and end of year if a course offered was a year course. In cases of short courses (modules), evaluation is done at the end of the course.

(ii) Cott curriculum has two dimensions: the academic specific dimension and the hidden dimension which is implicitly expressed in and through everything that makes up the Cott formation programme (see Figure 5.2). This understanding is partially alluded to in the explanation given of the concept *formation* in section 1.2.2. *[The majority of the participants were in support of an understanding that emphasised an integration of the two dimensions of curriculum].*

### ***(3) How might curriculum be enhanced at Cott?***

(i) In-depth induction programme for new academic staff on the teaching and learning culture of the institution so as to ensure consistency in practices (*design, implementation, assessment and evaluation*). Enforcement of this regulatory mechanism would ensure sustenance of organisational identity.

(ii) Implementers of curriculum (teaching staff and academic management personnel) should not be left to do as they think is the right thing to do even when they are already experienced in the profession. They should align their practices with entrenched DoHET legislation and Cott academic guidelines and policies.

(iii) Assessment of students, particularly formative assessment, should be extended to include debates or seminars with other theological institutions in southern Africa. A few Cott students only get to experience other ways of doing theology when they get an opportunity of going on a Student Exchange Programme. The rest of the Cott student body experiences a bit of that exposure through interactions with exchange students hosted by the College<sup>85</sup>.

(iv) The Cott academic faculty members should be enabled and encouraged to create more and firmer collaborative working relationships with experts in their respective areas of specialisation from other institutions. Additionally, more opportunities should be availed for their participation in intellectually stimulating programmes (seminars, workshops or conferences) in respect of their areas of specialisation.

It was at this point that I exposed the participants to information (*mirror data*) on Cott formation programme (with a focus on curriculum design, implementation, assessment and evaluation which I had gathered in the exploratory phase of the research process - refer to section 5.4). I had gathered this information through individual interviews, document analysis, observation and focus group discussions (refer to 3.4). The respondents had included Cott students, academic and management staff.

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<sup>85</sup>The suggestion to interact with other theological institutions in southern Africa was received with scepticism by some participants who were of the opinion that most of those institutions did not have comparable standards with Cott.

**Table 6.5: Mirror data on curriculum design, implementation, assessment and evaluation at Cott**

	<b>AREAS OF STRENGTH</b>	<b>AREAS OF WEAKNESS</b>
<b>CONCEPTUALISATION &amp; DESIGN</b>	<ul style="list-style-type: none"> <li>• High standard of education. Students who have been at universities before coming to Cott usually complain about not getting the higher marks that they have been getting at the universities.</li> <li>• Intentional and strategic discussions of curriculum related matters through staff meetings and workshops with occasional involvement of external experts (see Figure 6.9).</li> <li>• Qualified academic staff with strong commitment for their work.</li> <li>• A well provided for library.</li> <li>• The facilitation methodology of the Cott academic programme emphasises criticality, contextualisation and interdisciplinary engagements. As such, Cott products are ably equipped to engage with worldly experiences with an unbiased informed perspective</li> </ul>	<ul style="list-style-type: none"> <li>• Cott curriculum is not yet a coherent formation process.</li> <li>• Curriculum emphasises the academic strand of the formation programme of the College at the cost of the attention needed for the other strands (spiritual and ministerial).</li> <li>• New academic members of staff are not assisted enough with requisite knowledge and skills of curriculum design. The main reason for this <i>status quo</i> is the difficulty of time constraints in the work and life of the College.</li> <li>• Little collaboration between College and authorities who send the students to the College (dioceses) on what is covered in the College academic programme since dioceses have local training schemes from which students who are sent to Cott are drawn.</li> </ul>
<b>IMPLEMENTATION</b>	<ul style="list-style-type: none"> <li>• Input by external facilitators, though also an area of strength in the Cott academic programme, should complement internal facilitation and not go parallel or disrupt flow of teaching and learning activities at the College.</li> <li>• Despite the difficulties with the medium of communication (English Language) faced by the majority of the student body, students at Cott are positive about their work. Class attendances, participation in class discussions and submission of work generally meet the requirements of the academic programme.</li> <li>• Student support mechanisms such as assistance with English to those students who come from countries where English is not an official language, promote equality of access to the College academic discourses to all students.</li> <li>• Facilitation input by qualified external facilitators and visiting lecturers from across the world give a global dimension to the College academic programme.</li> </ul>	<ul style="list-style-type: none"> <li>• We move as islands with little awareness of what the others are doing in their teaching from the same curriculum. There is little interdisciplinary facilitation of the curriculum.</li> <li>• Both students and academic staff are faced with the difficulty of knowing how to balance academic and spiritual formation related matters at the College.</li> <li>• Ordinands must be exposed to other types of theologies, e.g. evangelical theology; ecumenism.</li> <li>• Resources available at the College such as internet access and a well-stocked library are not always used to the best benefit of the students. This has a negative impact on the development and implementation of the curriculum.</li> </ul>

<b>ASSESSMENT &amp; EVALUATION</b>	<ul style="list-style-type: none"> <li>• Generally, students receive constructive and fair feedback for their written work from the facilitators of the respective courses.</li> <li>• Existence and application of recognised academic regulatory mechanisms in regard to written work by students; i.e. academic policies and academic guidelines. An example of an important academic related policy in existence at Cott is the Policy on plagiarism.</li> <li>• Student feedback on facilitation of courses and curriculum is regular and generally done with honesty and diligence.</li> </ul>	<ul style="list-style-type: none"> <li>• Feedback from students on facilitation of teaching and learning at course level is not always managed with diligence and rigour at management level. The main reason for this curriculum managerial deficiency is the difficulty of time constraints in the life and work of the College.</li> <li>• Feedback from external assessors is not always up to the standards set by Cott and communicated with individual assessors.</li> </ul>
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#### 6.4.4.1 Summary of 1<sup>st</sup> Cott CLW

In line with the theoretical stipulations of the CHAT framework (refer to 2.3), participants approached the discussion with commitment and openness to listen to each other without holding back individual understandings of the subject matter under discussion (*curriculum design, implementation, assessment and evaluation*). This organisational atmosphere suggested a high participant readiness to engage on the subject matter with the goal of transforming organisational and individual practices. In addition to the *mirror data* on the subject (Table 6.4), the discussion revealed the following contradictions:

(i) between subjects and rules – students at Cott do not have an input in the design of the curriculum. Even though curriculum design is generally understood as an expert activity, the view generated at the discussion was that curriculum implementation and evaluation could be more rewarding to students if they (students) had opportunities to contribute in the design of curriculum (refer to Chapter Eight).

(ii) between subjects (Cott academic and management staff) and community (bishops and diocesan personnel involved in clergy leadership formation programmes) involvement in the conceptualisation, design, implementation, assessment and evaluation of the curriculum offered at Cott.

(iii) between artefacts and object – participants suggested the need to introduce educational collaborative partnerships with other theological institutions in southern Africa at Cott which could strengthen curriculum design, implementation, assessment and evaluation. Such collaborative partnerships would involve both academic staff and students.

These emerging contradictions, in addition to the *Mirror data* as presented in Table 6.4, had a bearing on the reconceptualisation of the object in the Cott case study (see 6.4.6.1) and the solution modelling activity (see 6.4.7).

#### **6.4.5 Cott curriculum review processes and participation**

Following the Vision and Mission statement review process was the curriculum review process (see Agenda – Annexure 6.1). The organisational *status quo* as explained above entailed full participation of the following structures at Cott:

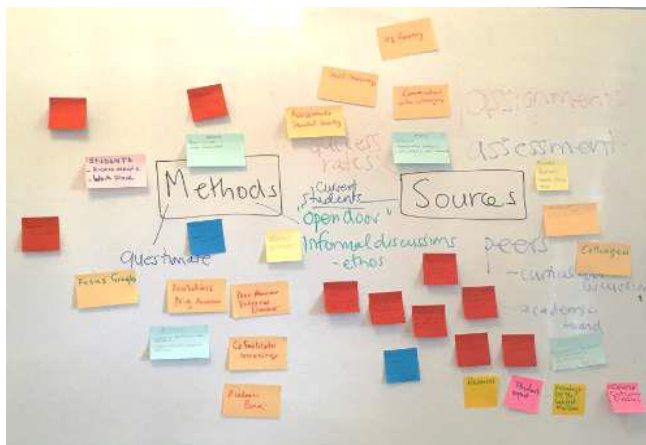
- (i) Cott academic staff as curriculum designers, facilitators of teaching and learning, internal assessors of student academic progress, spiritual and ministerial formators of students (refer to 1.2.2; see Figures 5.2; 5.4);
- (ii) Academic Board members which included teaching staff, student representatives, and College Council representatives;
- (iii) Cott management staff (see Figure 5.1).

In line with the agreement which I had made with the organisational management, I played the roles of an academic staff member and internal interventionist in the curriculum review programme. The former was a straightforward role in the sense that I contributed to the review process on the basis of my professional experiences of the curriculum under review and organisational life at Cott in general, as a formator. The latter role was a bit complex in the sense that I had to organise individual interviews and focus group discussions with selected organisational members outside the mainstream discussions on the subject (refer to 3.4.1.1.1 and 3.4.1.1.2 respectively).

The workshop was facilitated by an external expert in curriculum design, implementation, assessment and evaluation in the context of South African higher education and training. This was a two-day workshop as detailed in the agenda of the workshop. The first day focused on unpacking the theoretical foundations of the concept curriculum. This was aimed at exposing participants to the different understandings of concepts which could be used as the basis for designing, implementing, assessing and evaluating an institutional curriculum. The engagement provided opportunities for participants to question, critique and assess their own

or collective understandings of curriculum in its holistic nature in relation to the ultimate goal of clergy leadership formation in ACSA.

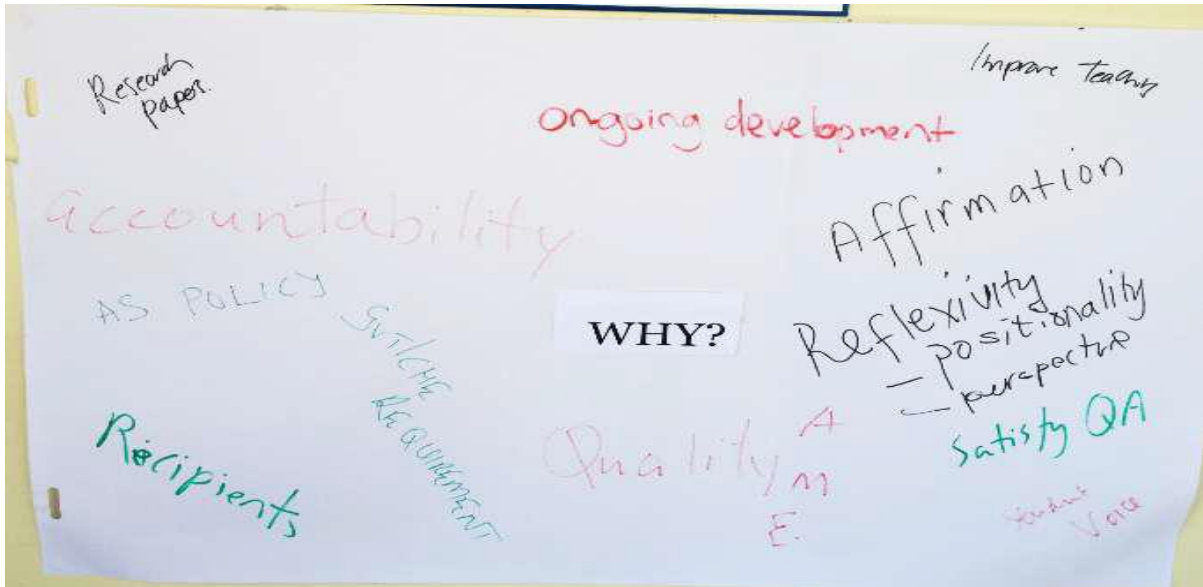
The first day of the workshop ended with identification and assessment of theoretical tools on curriculum which could be used to enhance participant understandings of the concept with the objective of improving their practices as implementers and developers of curriculum at Cott. The second day of the workshop focused on ascertaining the possibilities for curriculum enhancement for Cott on the basis of the theoretical frameworks which had been discussed on the first day. The deliberations settled on curriculum evaluation as the conceptual tool that Cott needed to use to enhance institutional curriculum design, assessment and implementation in view of internal (student academic progress) and external (DoHET) demands.



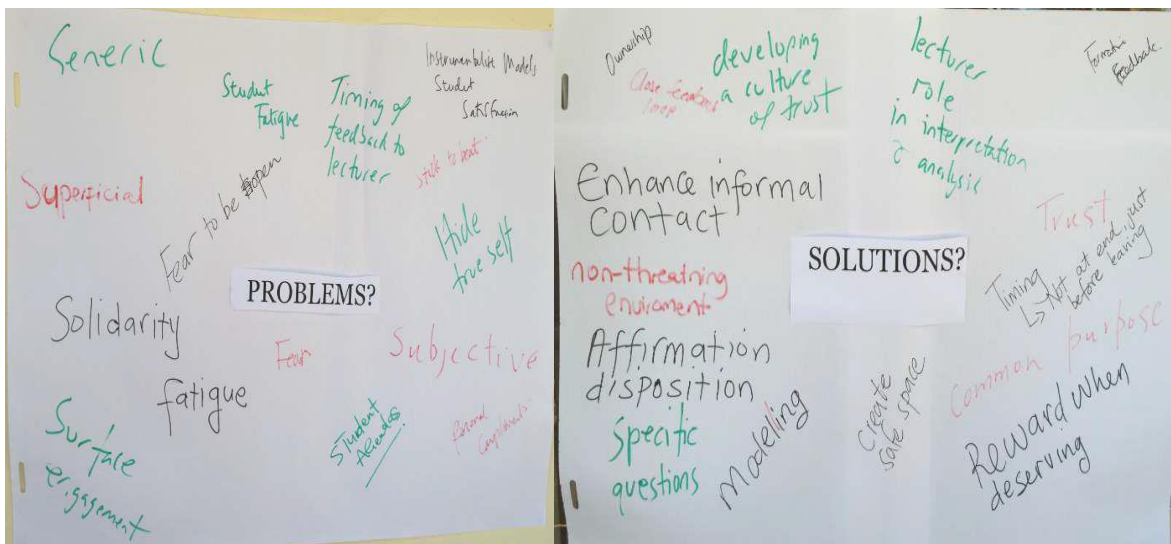
**Figure 6.10: Curriculum evaluation methods and sources of information.**



**Figure 6.11: Affirming objective of curriculum enhancement workshop at Cott**



**Figure 6.12: Participant input at the workshop, responding to the question “why evaluate curriculum?”**



**Figure 6.13: Participant input at the workshop responding to the questions: What problems are encountered in curriculum evaluation? How does one deal with such problems (solutions)?**

#### 6.4.6 Facilitation of 2<sup>nd</sup> Cott CLW

The purpose of the 2<sup>nd</sup> CLW was to re-conceptualise the object of the Cott curriculum review activity on the basis of the conceptual tools which had been discussed at the workshop in relation to the contradictions which had been revealed in the exploratory phase of the study (*mirror data* as presented in Tables 5.3; 6.4) and repeated at the 1<sup>st</sup> CLW (see 6.4.4) and the curriculum review workshop discussion on the second day. The discussion was done, in the first instance, within the CHAT framework (Engeström, 2007; 2011) as explained in Section

6.3.6.1 and then, in the second instance, within the critical realist framework (refer to Table 3.1). Participation consisted of organisational members who had attended the 1<sup>st</sup> CLW.

I created two questions as a guide to the CLW activities in response to the first aspect of the session (as explained above) as follows:

(i) From the Cott curriculum workshop discussions of the 1<sup>st</sup> day, which theoretical tools on curriculum design, implementation, assessment and evaluation did you find most relevant to Cott needs?

(ii) In what particular ways did the selected theoretical tools make connections with the Cott curriculum needs?

After an hour of discussion, participants gave feedback as summarised in Table 6.6 below:

**Table 6.6: Identified and assessed theoretical tools applicable on Cott curriculum design, implementation, assessment and evaluation**

SELECTED THEORETICAL TOOLS	CONNECTIONS WITH Cott CURRICULUM NEEDS
<p><b><u>DEFINITION OF CURRICULUM</u></b>  <b><u>What is curriculum?</u></b>            J. F. Bobbitt, J.F. (1918). <i>The Curriculum</i> (1918). Curriculum could be defined as:</p> <ul style="list-style-type: none"> <li>• School initiated course of deeds and experiences through which students could grow to become relevant and productive in their communities in a holistic sense.</li> <li>• Entire scope of educational experience, in and out of classroom, not just those intended, directed or planned.</li> </ul> <p><b><u>Differentiation of education and indoctrination</u></b></p> <p>“Education becomes indoctrination only when the educator tries to influence a specific action as an extension of his will, or perhaps when <i>s/he</i> helps a student blindly follow the dictates of an unexamined set of cultural assumptions about who <i>s/he</i> is and the nature of his or her relationships” (Mezirow, 1981, p. 20).</p>	<p>Participants who are involved in curriculum conceptualisation, design, implementation, assessment and evaluation at Cott were challenged to rework their conceptualisation of curriculum. The scholarly opinion asserts that what is documented as key or guiding principles in institutional curriculum design processes are espoused institutional capital which do not always determine what facilitators of teaching and learning do on a daily basis in their work. Examples of these artefacts include Vision and Mission statements, academic guidelines, curriculum outcomes and others. Therefore, curriculum should be understood as an <i>ideal</i> and <i>not concrete reality</i>. Through institutional curriculum, students are subjected to and positioned within certain ideologies or norms of an idealised society.</p> <p>In view of the above, curriculum design, implementation, assessment and evaluation should be student centred. Ultimately, the student should be the primary beneficiary from an interaction with a facilitator in a teaching and learning process. The facilitator has a formative and restorative responsibility in this interaction (Leach &amp; Paterson, 2010). On the other hand, the purpose of indoctrination is to advance the interest(s) or perspective(s) of the facilitator of a teaching and learning experience; what Freire calls the “banking model of education” (Freire, 1992) (refer to Chapter Seven and Eight).</p>
<p><b><u>Reflexivity in curriculum design,</u></b></p>	<p>The scholarly assertion is that successful or effective</p>

<p><b><u>implementation and evaluation</u></b></p> <ul style="list-style-type: none"> <li>• Testing, hypothesising; self-criticality on other perspectives; reciprocal relationships.</li> <li>• Assumption: reflexivity = enlightenment = change in thinking and practice (Barnett, 2003).</li> </ul> <p><b><u>Some questions asked by a reflexive facilitator of learning:</u></b></p> <p>Why am <i>I</i> doing this and not that?</p> <p>Why am <i>I</i> including this and not that?</p> <p>What <i>happened</i> in the class and why?</p> <p>What should my students be <i>achieving</i>? Are they achieving it? Why? How?</p> <p>What can I <i>learn</i> from evaluation data about my practice? What can I learn from theory/research about my practice?</p>	<p>facilitators of teaching and learning are reflexive practitioners; people who constantly reflect on the interplay between theory and practice in their work. Such considerations lead to focused, purposeful, formative and integrated evaluation of curriculum implementation and management. Therefore, curriculum should not be understood as cast or carved in stone like the biblical Ten Commandments. Curriculum should be understood as an on-going conversation in the teaching and learning spaces. In particular, this entails revising teaching methods, assessment tasks and evaluation methods when and where needed – challenging conventions about curriculum. This, therefore, suggests that creativity is critical to successful facilitation and evaluation of curriculum (refer to Chapter Seven and Eight).</p>
<p><b><u>The “Hidden Curriculum”</u></b></p> <p>“It is an opposite metaphor to describe the shadowy, ill-defined and amorphous nature of that which is implicit and embedded in educational experiences in contrast with the formal statements about curricula and the surface features of educational interaction” (Sambell and McDowell (1998, 391-392).</p> <p><b><u>Constructive alignment in curriculum design, facilitation and evaluation</u></b></p> <p>Purpose → Process → Measurable Outcomes (Biggs and Tang, 2007).</p> <p><b><u>Approaches to learning</u></b> (Methodologies)</p> <ol style="list-style-type: none"> <li>1) Surface <u>approach</u>: superficial engagement.</li> <li>2) <u>Strategic approach</u>: task-orientated learning with a prioritisation of high grades.</li> <li>3) <u>Deep approach</u>: transforming engagement which is encouraged of students and facilitators of learning to aim for. (Marton &amp; Saljo as cited in Marton, Hounsell &amp; Entwistle, 1984).</li> </ol> <p>(Relate 3<sup>rd</sup> approach with transforming clergy leadership formation models discussed in Chapter Eight).</p>	<p>The concept “practice” needs to be problematised in observance of the practical reality that what goes into and concerns interactions between facilitators of learning and students in any given context of teaching and learning, cannot be measured exhaustively. This brings to the fore the critical realist perspective of reality (refer to section 2.2). For instance, a question to ask in this regard is: what is it that we are aware is happening and what is it that we are not conscious is happening in and around the teaching and learning environment? Students bring into the learning and teaching spaces different kinds of <i>capital</i> which facilitators involved should recognise and, in some instances, where needed and necessary, integrate into the formally planned activities. This, therefore, has a bearing on the socio-cultural, political and economic environment which forms the background of the teaching and learning context. History is critical in these considerations (relate with Vygotskian theory as discussed in section 7.2.1).</p> <p>In view of the above, the challenge for facilitators of teaching and learning is to be responsive to given contextual circumstances in ways that enhance student learning. Facilitators of teaching and learning need to always ask themselves how they ought to handle situations which arise spontaneously in teaching and learning contexts. Such considerations have a bearing on the relevance of the obtaining teaching methods, assessment tasks and evaluation tools planned in relation to the desired purpose of the curriculum.</p> <p>The assumption, therefore, is that those involved in the task of curriculum design, implementation, and evaluation know what should be taught (subject content); the sources for the</p>

	streamlined content (resources); how the content ought to be delivered (methodologies); how the students would be assessed to ascertain how much they would have understood what would have been taught; evaluation strategies to validate the entire teaching and learning process and the fitness of the curriculum (quality assurance). Facilitation for transformational learning goes beyond the boundaries of the official curriculum – depending on the responses of the students. This serves both the able and the slow students (see Chapter Two; Four; Six; Seven and Eight).
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Guided by the critical realist articulation in Box 6.3 below and having reminded the participants of the sense in which the word “oppression” is used by critical realists (refer to 6.3.6.1), I asked them to do a deepened analysis of the ideas which had emerged in the first part of the discussion, summarised in Table 6.5.

**Box 6.4: Task for participants at the 2<sup>nd</sup> Cott CLW**

Analysis of information in Table 6.3 using critical realism whose theoretical premise is “to raise consciousness of deep-seated causes of oppression as a strategy for tackling oppression” (Houston, 2001, p. 59).

Participant feedback highlighted the following issues in relation to information in Table 6.5:

**6.4.6.1 Conceptualisation of curriculum**

Difficulties related to the conceptualisation of the object of Cott case study, curriculum, is one of the key issues which feature in the *mirror data* (Extracts 1 and 2 in Chapter Five; Tables 5.3; 5.4; 6.4); and in the first focus group discussion (see 6.4.4). The contradictions in the understandings of curriculum which arise in these instances generate issues about “structure and agency” (refer to 2.2), in relation particularly to power, ideological or theological positioning on the subject matter. I discuss these emerging critical issues to the study in Chapter Seven and Eight. In the context of Cott, these issues had a strong bearing on solution modelling (refer to 6.4.7) in response to contradictions revealed in connection with the object of the case study (curriculum design, implementation, assessment and evaluation).

#### ***6.4.6.2 Reflexive praxis in curriculum design, implementation, assessment and evaluation***

In the *mirror data* (Extracts 1 and 2 in Chapter Five; Tables 5.3; 5.4; 6.4); and in the 1<sup>st</sup> CLW (see 6.4.4) individual participants expressed different understandings of curriculum which they preferred were the basis for Cott formation practices (academic, spiritual and ministerial). However, because these individual members constitute one organisation, collegiality, collaboration and integration were imperative in their contributions towards realising the organisational goal (object/outcome – see Figures 5.1, 5.2, 5.4). As advised by Senge (1994) and emphasised in the CHAT framework (Engeström, 2008, 2011), effective organisational development has a two-fold basis: holistic development of individual organisational members and construction of a new object for the collective activity which implies enhanced organisational practices.

As such, the state of affairs at Cott on matters relating to curriculum design, implementation, assessment and evaluation challenged all participants involved to work as a team and not in silos despite their diverse theoretical understandings of the subject matter in question. These reflections were critical in the solution modelling session on this matter (refer to 6.4.7). In Chapter Seven and Eight I develop these observations, emphasising reflexive praxis on the basis of Archer's (2003) conceptualisation of what she calls the "internal conversation" and Edwards (2007)'s understanding of the concept "learning" as explained in Section 2.3.

#### ***6.4.6.3 Factors which impact curriculum implementation, assessment and evaluation***

How facilitators of clergy leadership formation execute their duties at Cott, particularly in relation to curriculum design, implementation, assessment and evaluation also came out as a critical issue in the *mirror data* (refer to Extracts 1 and 2 in Chapter Five; Tables 5.3; 5.4; 6.4); 1<sup>st</sup> CLW (refer to 6.4.4) and Cott curriculum review workshop (refer to 6.4.5). External, internal, personal, inter-personal issues were suggested or insinuated as factors which influence teaching and learning in any context, Cott in the case of this study. As such, solution modelling on matters relating to curriculum design, implementation, assessment and evaluation at Cott would require deliberations on how the identified influential factors could be managed with the goal of maximising clergy leadership formation at the College.

In Chapter Seven and Eight, there are in-depth discussions of how the identified factors impact effective curriculum design, implementation, assessment and evaluation in a teaching

and learning context such as Cott. To do that, I will draw ideas from the Vygotskian theory on human cognitive development which forms the basis of the conceptual framework used in the study (refer to 1.6).

Agreed at the end of the session was an arrangement for a concluding CLW which would model a solution for the contradictions in the Cott curriculum design, implementation, assessment and evaluation revealed, discussed and analysed above. All participants had committed themselves to attend.

#### **6.4.7 Facilitation of 3<sup>rd</sup> Cott CLW**

The concluding CLW in the Cott case study expansive learning programme, focusing on curriculum design, implementation, assessment and evaluation, was to respond to the second of the research questions which guided this chapter which is: *What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?* In other words, the session focused on solution modelling in response to the contradictions which had been surfaced on the subject matter in the Cott case study (refer to Extracts 1 and 2 in Chapter Five; Tables 5.3; 5.4; 6.4).

On the basis of Engeström's (2008) conceptualisation of the causality in work practices, solution modelling had been explained to the participants as a concerted effort by organisational members who, having been empowered with requisite knowledge and skills for the activity at hand, map out a strategy that would help in transforming their practices at the personal and organisational levels. In the case of the Cott case study, participants who were involved in the expansive learning programme had been prepared adequately to contribute towards developing solutions for the contradictions which had been revealed in the institutional activities related to curriculum.

The first task at the session was to remind participants of the key issues which had been streamlined about the challenges encountered at Cott in curriculum design, implementation, assessment and evaluation. The second task was to explain to the participants how the session would be done. As had been the case with the first two CLWs, I tasked them to two questions which were aimed at assisting with the diagnostic activity:

(i) What are the possible ways of solving the challenges experienced in curriculum design, implementation, assessment and evaluation at Cott?

(ii) How might the suggested solutions be applied at Cott?

Responding to the first question, participants had reminded the facilitator of one of the resolutions on the subject matter which had been reached at the Cott curriculum review workshop which related to the interests of the study as it had responded to the issue of imbalance in the College curriculum which had stood out, among other issues, in *mirror data* (see Table 6.4). The resolution had been to review Cott academic courses in the Practical Theology component of the curriculum so as to allow for more hands-on involvement of students in their learning engagements (experiential learning). This would be done in collaboration with Cott partners who are involved in social and community development programmes in ACSA (see Annexure 6.2 – Cott collaboration with Hope Africa).

Subsequently, academic staff in Practical Theology had been tasked to re-design the courses on offer at the College in line with the new curriculum requirement as explained above. Three academic courses were re-designed (see Annexures 6.11; 6.12; 6.13). This resolution related to the Cott experiential learning programme which, as explained in Section 6.4.3, was impacted by what was prioritised (object) in the Cott formation activity system (main activity system) within the Cott case study (see Figure 5.4; Section 5.4.3; 6.4.3).

Further to observing the curriculum review resolution on course re-design, participants made the following suggestions for implementation as mediation strategy for the challenges encountered in curriculum design, implementation, assessment and evaluation at Cott:

#### ***6.4.7.1 Fostering a culture of learning at Cott***

Participants observed the critical need to foster a culture of openness to learn at Cott. Issues which had emerged through *mirror data* (Table 6.4) and participant views on the object of the Cott case study which were expressed during CLWs and Cott curriculum review workshop (refer to 6.4.4.1; see Table 6.5) revealed that individual organisational members at Cott, staff or student, had their own understandings of curriculum. In some instances, this diversity had potential negative impacts on the academic work of the College, particularly curriculum design, implementation, assessment and evaluation.

Drawing from the CHAT framework which had been explained to the participants at the 1<sup>st</sup> Cott CLW (refer to 6.4.4), participants agreed to the opinion that diversity ought to be

understood and exploited as a basis and opportunity for learning. In this case, the learning would happen at least at three levels: personal, inter-personal, and organisational levels (Edwards, 2007). There is an in-depth discussion on this perspective on learning in Chapter Seven.

The organisational *status quo* above guided participants to recommend the following as mediation strategy:

**Box 6.5: Cott Mediation strategy A**

**REGARDING STUDENTS:** Cott academic and management staff needed to acknowledge that students did not come to the College *Tabula Rasa* but informed of other forms of knowledge and equipped with skills from prior work engagements in secular and church contexts which could be harnessed toward a cultivation and enhancement of their holistic formation as future clergy in ACSA. As such, students at Cott ought to be afforded representation at institutional activities dealing with curriculum design and evaluation in particular. [*The theoretical tools on curriculum which had been discussed during the Cott curriculum review workshop were cited as support for the suggested mediation strategy*].

**REGARDING ACADEMIC AND MANAGEMENT STAFF:**

Two-fold mediation recommendation which coheres with Senge (1990)'s theorisation:

- **Personal development:** “personal mastery”; “mental modes”
- **Collegiality:** “shared vision”; “team building”; “systems thinking”

The mediation strategy would apply in relation to: (i) working relationships between Cott members; (ii) working partnerships between Cott members and outside organisations and partners (see Figures 5.1, 5.2; 5.4).

In Chapter Eight I discuss critically Senge's conceptualisation of development at the personal and organisational levels on the basis of the participants' recommendation as represented in Box 6.4 in response to the contradictions on curriculum design, implementation, assessment and evaluation which had been revealed in *mirror data* (see 6.4) and discussed in CLWs (refer to 6.4.4; 6.4.6; 6.4.7) and Cott curriculum review workshop (see 6.4.5).

#### **6.4.7.2 Reinforcement of collaborative practices between Cott and partners**

In view of the contradictions which had been revealed (see Extracts 1, 2, and 3 in Chapter Five; Tables 5.1; 5.3; 5.4) and discussed in the Cott case study (see 6.4.4.1; Tables 6.4; 6.5), participants took observance of the lack of collaborative practices on matters relating to curriculum design, implementation, assessment and evaluation between Cott and her partners who include dioceses which send students to the College and organisations which assist the College with student experiential learning programmes (see Annexure 6.2). The question which arose from a deliberation of this institutional state of affairs was how the collaborative partnerships in question could be reinforced with the goal of enhancing curriculum design, implementation assessment and evaluation at Cott.

For instance, while it was a general expectation that Cott had a critical responsibility in broadening and transforming theological discourses in ACSA, a question needed to be asked in relation to the input by Cott partners towards such an endeavour. As a starting point, participants observed that all dioceses which send students to Cott would make a huge contribution to the desired goal (transformation of theological discourses) if they ensured that their discernment processes were built, facilitated, and managed on the basis of ACSA Canons, rules and regulations on clergy leadership formation (refer to 1.2.2). This would ensure that those whom they send to the College would have been adequately prepared for seminary formation.

On the basis of the observations above, the participants recommended the following:

#### **Box 6.6: Cott mediation strategy B**

Cott management should resuscitate discussions with dioceses (refer to Annexure 6.3) on the possibilities of enhancing collaborative working relationships between Cott and dioceses towards a seamless clergy leadership formation programme founded on the goal of designing and implementing a consolidated, integrated and context-based curriculum as a critical component of a holistic clergy leadership formation programme in ACSA (see Figures 5.1, 5.2, 5.4, 5.6, 5.7).

Annexure 6.4 summarises the benefits of strengthened collaborative working relationships between Cott and her partners particularly in relation to curriculum design, implementation, assessment and evaluation. In Chapter Seven, I discuss critically the theoretical and

methodological implications of collaborative working relationships on clergy leadership formation in ACSA stemming from the contradictions revealed and discussed regarding curriculum design, implementation, assessment and evaluation.

Cott management acknowledged the mediation strategies which the study had suggested and indicated commitment to implement them in future organisational deliberations on issues relating to curriculum design, implementation, assessment and evaluation. Academic staff, realising that individuals could benefit immensely from participating in occasional discussions on matters that related to their work and personal growth benefits, started a reading and discussion group in the time that the research process was being concluded. This was an indication that the expansive learning processes and activities had made an impact in the organisation.

#### **6.4.8 Conclusion on Cott case study**

The Cott case study expansive learning programme was unique in the sense that the request to engage organisational members in expansive learning programmes for the purposes of the study had coincided with an institutional programme which was aimed at realising almost the same goals as those of the study. It was therefore reasonable for the institutional leadership to advise me to organise a parallel expansive learning process which would complement the mainstream organisational activity, curriculum review/enhancement workshop.

The improvised arrangement proved to be a blessing in disguise for the needs of the research process in a number of ways. In the first instance, the state of readiness in the organisation to participate in expansive learning activities was high as organisational members were already in the mood of discussing a matter that was central to the work and life of the organisation, which implied direct implications on their practices and livelihoods. Consequently, the whole expansive learning process evoked personal motivation in individual organisational members to give an input in the deliberations.

In the second instance, the manner in which the curriculum review workshop proceedings and deliberations were complemented by CLWs done for the purposes of the study, enhanced understandings in organisational members of what was intended in the mainstream activity, curriculum review process. The theoretical and methodological frameworks of the study provided an impetus for organisational members to relate their practices as facilitators of

learning at Cott with the information on curriculum which had been discussed during the review workshop proceedings.

The College curriculum review process had started with a workshop on reviewing the College Vision and Mission statement. This made it easier for me to facilitate CLWs on the object of the Cott case study as the Vision and Mission statement review process had been concluded with a prioritisation of theological education. Further, the organisation had singled out curriculum review from theological education as the particular focus for expansive learning in response to the regulatory requirements of DoHET. In the methodological language used in the study, this organisational environment meant that the Cott formation activity system became the central activity system as theological education programmes at the College would provide an operational bearing on the other organisational activity systems namely: Cott management activity system and Cott experiential learning activity system.

Through CLWs, participants were empowered with life-long knowledge and skills (theoretical and methodological tools - artefacts) which they could use in future to problematise matters relating to their practices, particularly issues relating to curriculum design, implementation, assessment and evaluation. In doing so, they would continue to grow as professionals in their practices and simultaneously contribute towards transformation in their work places which, in the case of this study, is Cott (refer to Annexure 6.5 and 6.6).

## **6.5 CONCLUSION**

The chapter was organised and written in the framework of two research questions which are:

*i) What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?*

*(ii) What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?*

Using the expansive learning cycle as conceptualised by Engeström (1999) (see Figure 2.8), both research questions necessitated involving selected participants from the two case studies which constitute the study in CLWs. In response to the first question, participants were tasked to activities which revealed contradictions in their understandings of the object for each of the two case studies. Participants were equipped with theoretical and methodological tools drawn

from the frameworks of the study to use in the CLW processes and activities which, in the final activity, included solution modelling in relation to contradictions which would have been revealed on collectively identified organisational objects. In each case, the modelled solution was examined to fully grasp how it would apply in the context of the organisation in question.

Therefore, following the expansive learning steps suggested by Engeström (1999) (see Figure 2.8), the CLWs which were facilitated in the study involving participants from the two case studies used, went up to Action 4. In Section 2.3.3.3 I stated the reasons why the study could not go beyond Action 4 of the expansive learning cycle. I also stated other possibilities through which the remainder of the expansive learning cycle could be pursued in each of the two case studies used in the study.

Engeström's conceptualisation of what he calls "formative interventions" (2011) particularly as it relates to "concept formation", a historical phenomenon, was highlighted as a possible theoretical lens which could assist in unearthing the underlying mechanisms behind the contradictions revealed in the research data.

In Chapter Seven and Eight I discuss more critically the key issues emerging from the expansive learning processes and activities which relate to clergy leadership formation as presented in this chapter.

## **CHAPTER SEVEN: ANALYSIS OF THE THEORETICAL AND METHODOLOGICAL FRAMEWORKS USED IN THE STUDY**

### **7.1 INTRODUCTION**

In Chapter Six I described and explained the processes which were followed in facilitating CLWs with participants from the two case studies which were used in the study. A critical consideration which was made prior to facilitating the CLWs was the selection of appropriate and potentially effective theoretical and methodological frameworks to use in organising and conducting the CLWs. In Chapter Two and Three I did in-depth discussions of the selected theoretical and methodological frameworks. In Chapter Five and Six the frameworks were used to surface contradictions in and between activity systems in the two case studies and to guide the facilitation of CLWs, respectively. The impact that these frameworks had on the expansive learning processes in the two case studies did not receive much attention in Chapter Six, as the focus was more on CLW facilitation processes and procedures in response to the two research questions for the study, namely: (i) *What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?* (ii) *What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?*

This chapter analyses the effectiveness of the selected theoretical and methodological frameworks for purposes of knowledge consolidation and expansion in the research focus area. In particular, since the research, to the best of my knowledge, is ground breaking academic engagement in ACSA, the knowledge that emerged from the study could be the basis for future research endeavours in ACSA and elsewhere. As such, the chapter, in response to the research question “*How can such learning be expanded amongst key participants?*” dwells on an in-depth analysis of the expansive learning processes which were facilitated in the study with the objective of deciphering the extent to which the theoretical and methodological tools employed were helpful in creating and enabling collaborative expansive learning environments in each of the two case studies facilitated in the study.

The analysis done in the chapter takes full cognisance of the contributions which were made by the participants in the CLW activities across the two case studies in terms of physical participation and generation of relevant data to the study. Critical realist under-labouring questions which arose in response to these considerations in relation to the research question

guiding the chapter as indicated above and the conceptual framework alignment of the study as summarised in Table 2.1 are:

- (i) How did the participants learn as individuals and as a collective?
- (ii) How did the facilitator of the CLWs enhance participant learning at both individual and collective levels?
- (iii) What did the participants find helpful or unhelpful in their participation in the CLWs?
- (iv) How did the facilitator of the CLWs mediate challenges faced by participants (at both individual and collective levels) during and, in some cases, after the facilitation of the CLWs?
- (v) What was peculiar about the expansive learning processes in the context of the church, particularly ACSA?

In view of the above, I present in the next section an analytical and in-depth discussion of what could be understood as the foundation of the theoretical and methodological frameworks which were used in the study. This is done for the purpose of broadening and deepening the analytical discussion of the frameworks which would then create an objective basis for ascertaining their effectiveness in developing the goals and objectives of the study, particularly the organisation and facilitation of CLWs as presented in Chapter Six.

## **7.2 ANALYSIS OF THEORETICAL AND METHODOLOGICAL FRAMEWORKS**

### **7.2.1 Background considerations**

Engeström writes:

Give people facts, open their minds, and eventually they will realise what the world should become. I would call this an *enlightenment view of learning*. Learning is a fairly simple matter of acquiring, accepting, and putting together deeper, more valid facts about the world. Of course, this tacitly presupposes that there are teachers around who already know the facts and the needed course of development. Inner contradictions, self-movement, and agency from below are all but excluded. It is a paternalistic conception of learning that assumes a fixed, Olympian point of view high above, where the truth is plain to see. (2000b, p. 530)

In this quotation, Engeström raises a number of issues related to teaching and learning which suggest different ontological and epistemological orientations which, when applied to ACSA

clergy leadership formation programmes and activities as revealed in Chapter Five and Six, would confirm the diversity of opinions on learning programme management issues such as conceptualisation, design, facilitation, assessment and evaluation (see Tables 5.1, 5.3, 6.4). Looked at from a theoretical and methodological perspective as used in the study, the quotation suggests Engeström's emphasis on the need for and value of expansive learning for those who learn and those who facilitate learning programmes and activities in organisations such as ACSA. In other words, Engeström is proposing a conceptualisation of teaching and learning that goes beyond individual participation for the purposes of acquiring knowledge to an understanding that emphasises that "learners (and teachers) learn something that is not yet there ... learners (and teachers) construct a new object and concept for their collective activity, and implement this new object and concept in practice" (Engeström et al., 2010, p. 2; refer to Table 6.5). As will be discussed in Section 7.2.2.1, this transforming understanding of teaching and learning qualifies the one who leads expansive learning activities as facilitator and learner (Vygotsky, 1978, p. 86; refer to 7.2.6).

In Section 2.3.3.33 expansive learning was explained as a core objective of CLWs which, therefore, qualifies it as a critical concept in the study. In line with the goals of the study as discussed in Section 1.4, the questions outlined in 7.1 centre on expansive learning. In Section 2.3.3.3.3 and 3.2.1, the theoretical and methodological foundations of the concept of expansive learning were discussed briefly. For the reasons mentioned in Section 7.1, an interest that emerges in the study as an extension of what was briefly discussed and emphasised about expansive learning in Section 2.3.3.3.3 and 3.2.1 and the findings emerging from the CLWs which were facilitated in the study (refer to Chapter Six), relates to a consideration of how the concept (expansive learning) can be located more adequately "in the conceptual field of learning theories" (Engeström et al., 2010, p. 2). Such a quest entails recourse to teaching and learning theories which, in the first consideration, form the theoretical foundation of Engeström's conceptualisation of expansive learning and, in the second consideration, complement the theoretical and methodological tenets which define the concept (expansive learning).

In relation to the first consideration above, Lev Semyonovich Vygotsky and his successors (see Section 2.3.3.1) are associated with the origins of the CHAT theoretical and methodological framework within which the concept of expansive learning is located (Engeström, 1987). In the second consideration, works by Gregory Bateson (1972), Daniels

(2002; 2007) and Anne Edwards (2005a; 2007) among others, have been drawn from by CHAT theorists to complement and strengthen the conceptualisation and implementation of the expansive learning theoretical and methodological tool. Jack Mezirow's transformative learning theory (2000) which has a particular interest in enabling practitioners' reflective systemic analysis of own and organisational practices (Warmington et al., 2005; Engeström & Sannino, 2010), also complements Engeström's expansive learning concept.

However, Engeström cautions that most standard learning theories do not help much in investigative deliberations to ascertain how participants in organisations or communities who practice expansive learning related activities actually learn, the reason being that "people and work organisations are all the time learning something that is not stable, not even defined or understood ahead of time ... new forms of activity are literally learned as they are being created" (2001, p. 134). It was on the basis of this observation that the learning theorists used to broaden and deepen the discussion in this chapter, were selected.

Vygotsky's (1978) cognitive psychology which I discuss next, is a firm theoretical and methodological foundation upon which the ideas postulated by the learning theorists mentioned above could be critically discussed in relation to Engeström's (1987) expansive learning concept. The discussion is based on what is understood to be Vygotsky's original work and writings by those who are referred to as Vygotskian theorists.

## **7.2.2 Vygotskian conceptualisation of human cognitive development**

Vygotsky, dubbed the Russian psychological theorist of the 1920/30s was instrumental in championing a government mandated programme whose aim was to re-formulate psychology for the purpose of using the resultant understanding of the concept as a tool to effect national socio-political and economic reconstruction post-Bolshevik revolution of 1917 (Yamagata-Lynch, 2010).<sup>86</sup>

As an ardent believer of the Marxist ideology, Vygotsky proposed an appropriation of "Marx's political theory regarding collective exchanges and material production to examine the *organism* and the *environment* as a single unit of analysis" (Yamagata-Lynch, 2010, p. 15). By *organism* and *environment*, Vygotsky is understood to have meant *human being(s)*

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<sup>86</sup> This project is a solid illustration of the instrumentality of conceptual tools in agential projects; a perspective that is emphasised in this chapter and Chapter Eight and Nine.

and *social environment* respectively. In a nut-shell, the understanding is that human beings can only find meaning of *being* in any given context if they are able to appropriate the resources available through collaborative practices, the understanding on which the CHAT framework is built. On this psychological theoretical premise, under the prevailing Russian socio-political and economic circumstances of the time, Vygotsky's writings suggested an understanding of psychology as "a science that treated the *organism* and the *environment* as two disembodied entities that were connected through stimulus (need/s) and response (object; mediated agential projects) relationships" (Scribner, 1997 as cited in Yamagata-Lynch, 2010, p. 15)<sup>87</sup>

Put differently, the Marxian theory postulated a conception of the nature of work, in any given context, which asserted that "labour is above all a process between *man* (organism) and *nature* (environment), a process in which *man* through his actions mediates, regulates, and controls his material exchange with nature" (Habermas, 1971 as cited in Holt, Armenakis, Harris & Feild, 1993, p. 102). A development of the Vygotskian theory (in his time and after his death) gave birth to other theoretical concepts which include: socio-cultural and historical theory<sup>88</sup> (cultural mediation), Zone of Proximal Development, internalisation, externalisation, vertical and horizontal learning and scaffolding, which I discuss in the sections following and later on decipher their relevance to the study (see 7.2.3).

Vygotskian conceptualisation of cognitive psychology has immensely influenced deliberations of educational theoretical and methodological frameworks from his time to contemporary times, particularly after his work had been translated into English (Karpov & Haywood, 1998). A number of ideas which constitute what has also come to be known as "Vygotsky's analytic priority" (Wertsch, 1985, p. 29) in the field of psychology within which human cognitive development theorisation is located, have been and continue to be used as

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<sup>87</sup>Vygotsky's proposal came about in opposition to Pavlov, a fellow Russian psychologist whose theory of classical conditioning had already gained momentum at the time. In classical conditioning, Pavlov proposed a unidirectional stimulus-response relationship between organisms and their environments (Vygotsky, 1978).

<sup>88</sup>A number of terms are used to refer to socio-cultural and historical theory such as socio-cultural learning theory, social learning theory, co-constructivism, cultural-historical activity theory, situated learning and cognition and context-based learning theory (Lantolf, 2000). These terms underscore the psychological understanding that human cognitive development is culturally situated which underscores Vygotsky's perspective. I critically discuss this understanding in Section 7.2.2.1.

conceptual and methodological tools in educational deliberations in different contexts the world over.

This section has engaged the theoretical foundations of human cognitive (consciousness) development from a Vygotskian perspective. In the following sections, I present detailed discussions of the concepts associated with Vygotsky's cognitive psychology with the objective of reinforcing the theoretical and methodological foundations which frame the study, particularly in relation to the concept of expansive learning. This will entail revisiting the CLWs which were facilitated in the study (refer to 7.2.3) to ascertain how the Vygotskian related concepts under discussion had a bearing on the manner in which the CLW engagements were theoretically and methodologically planned, organised and facilitated in alignment with the focus, goals and research questions which frame the study.

Also important in the analytical discussion, in line with the purpose of the study as presented in Section 1.3, is to consider how the critical research findings which emerged from the CLW engagements contributed towards responding to the endeavour to explore collaborative clergy leadership formation practices in ACSA which could be expanded through learning.

#### ***7.2.2.1 Cultural mediation***

Vygotsky's assertion that human cognitive development happens in a specified socio-cultural and historical context (Vygotsky, 1978; Wertsch & Tulviste, 1992; John-Steiner & Mahn, 1996) is expressed cogently through the concept of cultural mediation. At the core of the concept are Vygotsky's theoretical ruminations about the actual processes which he understood to be instrumental in facilitating "higher mental functionings" in individual human beings (Wertsch & Tulviste, 1992, p. 548); "the basis of the qualitative leap from animal to human psychology" (Vygotsky, 1978, p. 57).

Vygotsky put together two words, *culture*, which he used as an adjective (cultural), and *mediate*, which he used as a noun (mediation) to substantiate the practical determinants of his proposed theory of human cognitive development. As an adjective, the word *cultural* qualifies the noun *mediation*. On the understanding that "culture is the product of social life and human social activity" (Vygotsky, 1981b, p. 164), and mediation as referring to "the role played by significant people in an individual person (learner)'s life" (Vygotsky, 1978, p. 88), cultural mediation, therefore, is what "More Knowledgeable Others" (MKOs) do, with the

aid of resources (cultural artefacts) available in the context in question, to enable others (learners; children) to develop cognitively. On this understanding, Vygotsky observed that under normal circumstances in any context, social engagements (interactions) with MKOs like parents, teachers and older siblings, present a child or learner with opportunities to work on tasks and deal with challenges which are mediated through cultural tools such as language, symbols, signs, ideas and behaviours (Vygotsky, 1978; see explanation of Zone of Proximal Development in 7.2.2.2).

It is evident that Vygotsky understood social context or environment as the totality of lived human experiences inclusive of cultural, historical, and institutional settings which imply that human actions are not performed randomly but are formed, shaped and formulated in line with observed cultural norms and practices (external influences) (Vygotsky, 1978). What Vygotsky meant is that individuals, as does the community as a collective, depend on community members, the resources (cultural artefacts) at their disposal, recognised and practised structural arrangements (norms, policies, traditions, values and others – refer to Figure 7.1) to achieve the desired outcomes of their activities (agential projects; refer to CHAT framework as discussed in 2.3).

In view of the above, it can be concluded that at the heart of Vygotsky's proposed human cognitive development theory was the understanding that people are social beings whose needs and actions (agential mediated projects) towards achieving those needs cannot be understood out of context. What is emphasised here is Vygotsky's opinion about how people respond to the practical realities surrounding them and, as a result, develop their consciousness, what he also called "higher psychological (mental) processings and functionings" (Vygotsky, 1978). Vygotsky believed that this theoretical premise ought to be regarded as a critical consideration in any endeavour to understand the basis of relationships between individual human beings in any given context, at any given time, and how they, for individual or collective purposes (needs), relate with their environment(s) in a holistic manner (Vygotsky, 1978).

Vygotsky's theoretical postulation on human cognitive development as a socio-cultural and historical phenomenon is aptly captured in his assertion that "every higher (mental) function, before becoming internal mental function (intra-psychological functioning), previously was a social relation between two people (inter-psychological functioning). All mental functions are

internalised social relations” (Vygotsky, 1981b, p. 163). Socio-cultural and historical theorists also refer to this theoretical *formula* as Vygotsky’s “general genetic law of cultural development” (Wertsch & Tulviste, 1992, p. 549)<sup>89</sup>.

Vygotsky’s emphasis on the role of social interaction in human cognitive development resonates with the significance placed on socialisation in the field of sociology pertaining to the holistic development of a person (child/learner). At the centre of the discourse, as applies to both perspectives (psychology as appropriated by Vygotsky and sociology as theorised by scholars such as George Herbert Mead and Charles Horton Cooley)<sup>90</sup>, is the argument that “the way we see, think and act in our worlds are shaped by the cultures in which we are formed and in turn we shape those cultures by our actions” (Edwards, 2007, p. 259).

Synthesised, what is emphasised in this understanding is that “the social dimension of consciousness is primary in time and in fact” (Vygotsky, 1979, p. 30), implying the existence of “systems of social relations (and corresponding) systems of meaning” (Hays, 1994, p. 68) in a particular context and at a particular time in the history of a given community as illustrated in Figure 7.1. This theoretical perspective is captured in the assertion that “(cultural) mediation builds an analytical link between socio-historical processes and their material infrastructures on the one hand, and individuals’ mental processes on the other. Humans internalise forms of mediation provided by institutional means” (Engeström, 2003, p. 139).

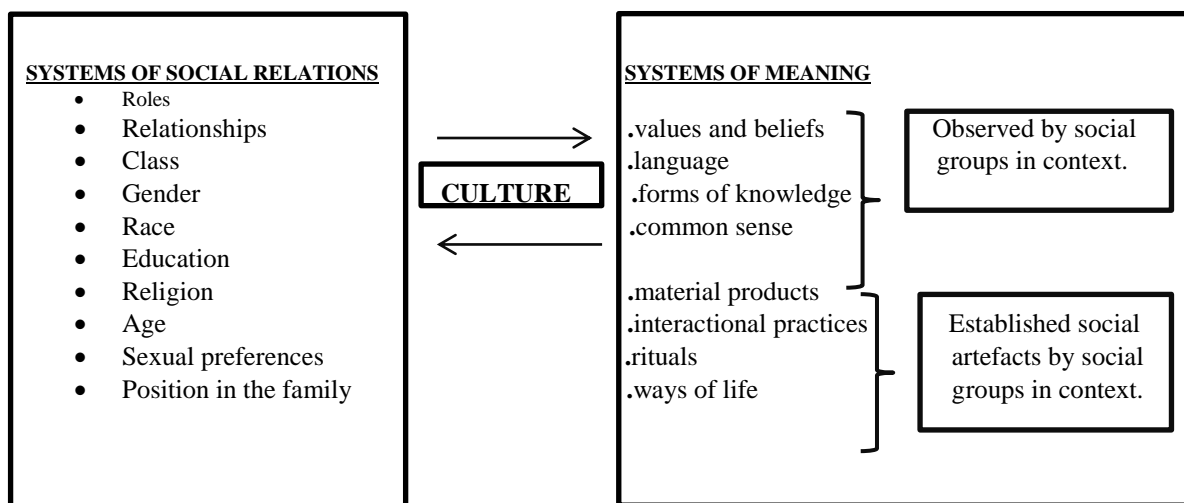
Concurring with Edwards (2007), Hays (1994, pp. 57-72) argues that what we think and how we think is “derived from old ways of thinking and respond to existing ways of thinking in a systematic fashion. What is emphasised here is the opinion that culture influences not only what we think about, but how we think about it” (see discussion on *habitus* in 2.4.7). In concurrence, Groome (1980, pp. 110-111), through his conceptualisation of *socialisation*,

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<sup>89</sup>By inter-psychological functionings (externalisation) and intra-psychological (internalisation) functionings Vygotsky meant two instances experienced by a child (learner) in cognitive development processes, the first referring to social interactions with MKOs who support the child (learner) with working on assigned tasks using resources available in the social environment towards higher mental functionings. Intra-psychological functionings refer to the individual private mental processings that a child (learner) does after the encounter(s) with MKOs towards construction of own sense or knowledge of the subject matter in question (Vygotsky, 1978; Wertsch et al., 1992).

<sup>90</sup> Groome (1980, p. 109) reflects that psychologists, anthropologists and sociologists investigate what the term socialisation entails from their own perspectives. “The psychologist concentrates on individual psychic consciousness as it emerges in interaction with a social context. The sociologist studies the phenomenon from the perspective of contemporary social structures and asks how people come to the self-understanding by which they fulfil their roles within society. The anthropologist, who may prefer the term enculturation, investigates the process from the perspective of the transmission of culture from one generation to the next by means of a commonly held symbol system”.

uses the term *objectification* to emphasise that human beings create social systems and structures which, having been instituted to regulate people’s activities (agential projects) and relationships, instantly assume a life of their own (*reification*). As such, all human beings (their creators) can do, besides transforming them when deemed necessary, is to comply to what they stipulate (cultural reproduction). Further, Groome observes that such a *status quo* helps to create stability in the community as individuals across the spectrum of communal engagement are forced to comply with the regulatory systems and processes in place (see 2.2.2.2).



**Figure 7.1: Illustration of the components of culture according to Hays (1994) complemented by Vygotsky (1978)**

Behaving contrary to the stipulations of the recognised and binding communal systems and structures would be meted with sanctions and reprimands (Groome, 1980, p. 109). Relating to this opinion, Andrew Sayer (2011, p. 25) argues that “values and valuations guide our actions, and our actions have consequences for our well-being and the things we care about”. In connection with the Vygotskian theorisation of human cognitive development, these theoretical ruminations underscore the opinion that human behaviour is culturally mediated (Engeström, 1987).

Hays (1994, p. 58), having studied the theories advanced by other sociologists like Durkheim (1961), Weber (1947), Giddens (2006) and Bourdieu (2004) concludes that it is conceivable to suggest that culture should be understood as “both the product of human interaction and the producer of certain forms of human interaction” which reminds us of the critical realist conceptualisation of the interplay between structure and agency as discussed in Section 2.2 and illustrated in Figure 2.3.

The cross-pollination of ideas between the psychologist and the sociologist on human development in *cognition*, *self* and *identity* discussed above underpins the conceptualisation of “the process by which people come to be who they are by interaction with other people in their social environment” (Groome, 1980, p. 109). This understanding reinforces the perspective advanced by Vygotskian theorists that Vygotsky reformulated psychology to emphasise disembodiedness of *organism* and *environment*, a two-way and not unidirectional interactional process as had been proposed by fellow psychologists in his time led by Pavlov (see footnote 2 under 7.2.2). Concurring with this line of argument, Williams and Burden (1997) assert that the Vygotskian theory discredits the school of thought that subscribes to the idea that knowledge and skills can be successfully imparted to children (learners) with little or no regard of contextual socio-cultural and historical realities. The critical realist perspective used in the study as “underlabourer” problematises these opposing theoretical perspectives (see Section 7.2.4.4). In Chapter Eight (section on *identity and leadership formation*) I discuss critically how these theoretical foundations have bearings on the facilitation of clergy leadership formation programmes and processes in ACSA.

#### ***7.2.2.2 Zone of Proximal Development and scaffolding***

Vygotsky defined Zone of Proximal Development (ZPD) as “the distance between a child’s actual development level as determined by independent problem solving, and the higher level of potential development as determined through problem solving under adult guidance or in collaboration with more capable peers” (Vygotsky, 1978, p. 86). Underlined in this hypothetical statement is a suggestion of the following beliefs which, in broad terms, resonate with what was discussed in the previous section about the Vygotskian theory of human cognitive development:

(i) As social beings, children (learners) enter a formal teaching and learning space informed of “spontaneous concepts (which) are the results of generalisation and internalisation of everyday personal experience in the absence of systematic instruction” (Karpov & Haywood, 1998, p. 28). This foundational knowledge base, in the first instance, caters for lower human mental functionings with “metacognitive processes ... (expressed through) semiotic tools of self-regulation (which include) self-planning, self-monitoring, self-checking, and self-evaluating” (*ibid.*, p. 27). In the second instance, the internalised mental tools resultant of

social interactions become the basis on which higher mental functionings are built (Vygotsky, 1978, p. 55).

In these complex psychological processes, “previous understandings do not necessarily get dismissed but are placed in new configurations which allow for new meanings to be recognised” (Wertsch & Tulviste, 1992, p. 554). Social interaction is here foregrounded as a prerequisite for knowledge construction in Vygotsky’s theory of human cognitive development. Edwards (2005a) uses the phrase “cultural interpretation” to articulate the setting where the MKO and the learner can collaborate meaningfully using selected and relevant cultural artefacts in teaching and learning activities<sup>91</sup> (refer to Chapter Eight, section on collaborative leadership model).

ii) Learning takes precedence of human cognitive development<sup>92</sup>. Vygotsky’s (1978, pp. 79-83) belief is that children (learners) do not learn because they are developed but they develop through learning under the guidance of MKOs who use a variety of cultural artefacts, the most critical of which is language.

(iii) Effective teaching and learning programmes and activities are predicated on intentional and systematic pedagogical practices which include assessment of learners at any given point in their lives to gauge their levels of cognitive development in terms of ability to solve tasks on their own and their potential to advance to the next level of their learning experiences (Vygotsky, 1978, pp. 83-88).

Questions which could be asked in this regard are:

(a) Who are the learners?

(b) What is their socio-cultural context?

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<sup>91</sup>Scholars such as Olsen et al. (1992), Gokhale (1995), and Jacob et al. (1996) associate what they call collaborative learning theory (in some instances presented and discussed as cooperative or participative learning theory) with the Vygotskian theory of human cognitive development. The thrust of the theory is that knowledge is generated in the process of communication in an environment characterised by mutuality and collaboration. In Chapter Eight, I discuss and analyse some of the emerging models of clergy leadership formation in ACSA in conversation with this perspective about learning which is both theoretical and methodological.

<sup>92</sup>Vygotskian theory distinguished human cognitive development processes with human biological development processes which Vygotsky postulated were complementary in enabling a learner to develop cognitively. However, Vygotsky conceded that the two (instruction and biological human development) did not necessarily coincide but were representative of two processes which existed in a very complex interrelationship (Vygotsky, 1978, pp. 79 - 84).

(c) What are they required to learn

(c) What are their cognitive abilities?<sup>93</sup>

These questions would guide in the selection of appropriate methodologies and approaches to use in endeavours to assist the learners with their learning experiences towards independent developmental achievement. It was on this basis that Vygotskian theorists asserted that good instruction lays the foundation for the generation of cognitive functionings and processings towards attainment of advanced mental tools (Wertsch, 1985; Wertsch & Tulviste, 1992). Lantolf (2000) concludes that this theoretical premise was one of the key reasons which motivated Vygotsky to propose the concept of the ZPD.

In relation to professional learning which, in the context of this study, is focused on investigating clergy leadership formation models in ACSA which can be expanded through learning, Engeström (1987, p. 174) redefines the ZPD to mean “the distance or difference between the present actions of individuals and the historically new forms of activity which can be collectively generated as solutions to the double bind potentially inscribed in everyday actions” (see Figures 7.2; 7.3).

Drawing from the field of architecture, Vygotskian theorists use the term *scaffolding* to refer to the specific approaches and methodologies which MKOs can use to facilitate teaching and learning programmes and activities which would enable the learners to move through the ZPD with interest, focus and certainty of the requirements of the set learning tasks (Wertsch, 1980; Rogoff, 1990). By its nature, as already emphasised above, ZPD uses the collaborative (dialogical, participative, mutually-inclusive, constructive, relational) methodological framework which can be complemented by pedagogical methods such as modelling through demonstration or giving elaborated feedback to student performances; chunking (breaking the task into sizeable units for students to attempt working on within allocated time schedules); probing questions, substantiated by learner assigned research tasks; allocating sufficient guided discussion time in teaching and learning activities; simplification of diction prior to

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<sup>93</sup>Within the conceptualisation of the ZPD, Vygotsky and socio-cultural and historical theorists who inherited his legacy such as Engeström (1987) used the term “double stimulation” to articulate the theoretical observation that activities which are aimed at effecting transformation in people’s lives which, in the context of the considerations under discussion relate to teaching and learning processes, begin with a “double bind” or a conflictual state of affairs (stimulus 1) whose proposed solution (expansive learning) would be stimulus 2 (refer to Figures 3.9 and 7.2).

teaching and learning engagements or attempting set assessment tasks (Rosenshine & Meister, 1992; Wertsch & Tulviste, 1992; Donato, 1994; Karpov & Haywood, 1998).

Successful application of scaffolding approaches creates learning communities out of ordinary teaching and learning contexts; “communities in which each participant makes significant contributions to the emergent understandings of all members, despite having unequal knowledge concerning the topic under study” (Palincsar et al., 1993 as cited in John-Steiner & Mahn, 1996, p. 199; see critique of the ZPD concept in 7.2.4.4).

Two important issues raised about the scaffolding methodology are (i) the recommendation for the facilitator of learning to gradually withdraw scaffolding with the increasing positive responses of the learners to enable them to take more responsibility for the task at hand, and (ii) the need for the facilitator of learning to consider using different scaffolding approaches with different learners in accordance with their cognitive development levels and abilities to internalise taught problem-solving skills within set time-frames. These guidelines take cognisance of the biological fact that people are created differently (Vygotsky, 1978, p. 123). It was on the basis of this theoretical positioning that Mercer in Mercer and Hodgkinson (2008, p. 4) averred that facilitation of learning is not simply a matter of information dissemination to learners but “it involves the gradual induction of students into new perspectives on the world, the development of new problem-solving skills and new ways of using language for representing knowledge and making sense of experience” (refer to 7.2.3).

In summary of this section, Edwards (2005a) observed that Vygotsky’s conceptualisation of the ZPD framework gave birth to two theoretical and methodological principles which in later years, particularly in the work of socio-cultural and historical theorists such as Engeström, were pivotal in the theorisation and implementation of the expansive learning theory:

(i) Cultural interpretation – an expression of how MKOs connect the learner’s everyday knowledge and scientific concepts towards construction or development of higher mental functionings in the learner (see Figure 7.3).

(ii) Collectivist interpretation of learning – understood as an articulation of the dialogic or collaborative nature of Vygotsky’s conceptualisation of consciousness/cognitive development through culturally mediated social interactions. In relation to teaching and learning contexts,

the principle challenges facilitators of learning (MKOs) to select their methodologies and approaches with an intention to maximise learner participation, innovation, creativity and independence in their learning activities. In work related contexts such as ACSA where selected individuals are tasked to work together on the responsibility of facilitating clergy leadership formation programmes and activities, collectivist interpretation of learning entails coordinated and networked (not always homogeneous) understandings of the object of their efforts towards collaborative practices. In Section 7.2.4 I explain how this principle, which has affinities with Level 3 of Bateson's (1972) theory, is the most critical theoretical basis on which the goals and purpose of this study are founded<sup>94</sup>.

### 7.2.3 Applicability of critical realist under-labouring on research findings

Table 2.1 is a summary of the conceptual framework alignment which is employed in the study. Undergirding the framework is a critical realist under-labouring "function" particularly in relation to the design of the study and the analysis of research findings. In this section of the chapter (and study), the focus is on the latter "function". Danermark et al. explain the essence of data analysis in qualitative research as follows:

In order to understand and explain the social world, as scientists we try to understand and explain what meaning actions and events have to people, but we also endeavour to produce concepts, which make it possible to transcend common sense and attain a deeper understanding and explanation of a more abstract character. This is called the double hermeneutic of social science. (2002, p. 200)

What is emphasised in the quotation is that theory plays a dual purpose in data-based research such as this study. In the first instance, data analysis done within selected theoretical and methodological frameworks has the potential of generating a sense of meaning about the

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<sup>94</sup> Gregory Bateson (1972) postulated a theory of learning in which he proposed three distinctive levels of learning as:

**Level 1** – learning is measured on the bases of acquisition and conditioning behavioural skills. Learners accrue, unquestioningly, knowledge disseminated. Paulo Freire (1972) calls this model of teaching and learning "banking concept".

**Level 2** – in the course of *Level 1* learning experiences, learners "acquire the deep-seated rules and patterns of behaviour characteristic to the context itself. Thus, in classrooms, students learn the 'hidden curriculum' of what it means to be a student such as to please teachers, how to pass exams, how to belong to groups, etc." (Engeström, 2001, p. 139). Bateson then observed that some of the *Level 2* experiences come with contradictory demands on learners, thus creating a "double bind" which could lead to *Level 3*.

**Level 3** – At this level, "a person or a group begins to radically question the sense and meaning of the context and to construct a wider alternative context" (*ibid.*). In relation to expansive learning and developmental work, socio-cultural and historical theorists such as Engeström use Bateson's *Level 3* conceptualisation of teaching and learning to reinforce their developmental work research projects particularly in relation to the concept of expansive learning. I apply Bateson's theory in Section 7.2.3.

studied phenomena. The analytical engagements aim to go beyond the “empirical” and the “actual” domains of reality in order to reach the “real” which is the deepest domain of reality as it contains all the mechanisms with generative powers (Ackroyd & Fleetwood, 2000; refer to 2.2; Table 2.1). In the second instance, discourses on investigated phenomena can be broadened and deepened through the use of concepts which would have emerged from the analytical discussion of research findings. In work related organisations such as ACSA, this would entail utilisation of the emergent conceptual tools to transform the organisation in two ways (broadly speaking): agential transformation in holistic terms, and organisational renewal in terms of cultural practices (Warmington et al., 2005; Engeström et al., 2010; refer to 2.3.3.3.3; Chapter Eight).

On the basis of the above discussion, it can be argued that the Vygotskian theorisation of human cognitive development discussed in Section 7.2.2 is imbued with epistemological and ontological assumptions which fall under the transformative theoretical paradigm within which critical realism, CHAT (beyond Vygotsky), and educational leadership theory have been located in the design of this study (refer to Table 2.1). As such, it can be surmised that for purposes of this study, a conceptual trajectory which begins in Vygotskian philosophical theory on human cognitive development and is projected in the theoretical and methodological frameworks used in the study, is drawn. The effectiveness of such a consolidated conceptual framework is tested in Chapter Eight as explained in Section 7.2.4.2.

#### **7.2.4 Application of Vygotskian theory on CLWs facilitated in the study**

As explained in Section 3.4.4, CLW engagements create opportunities for organisational members to collaborate in collective reflective exercises on issues pertinent to the transformation of their practices at individual and organisational levels (Engeström, 1998; Sannino, 2008). In the understanding of Vygotskian theorists as explained in Section 7.2.2, such human actions are an articulation of the belief that humanity (“organism”) can only discern the meaning of existence in context (“environment”) (Scribner, 1997 as cited in Yamagata-Lynch, 2010, p. 15). In developmental terms, as would have applied to the Russian community of Vygotsky’s time and, in connection with the goals and objectives of this study, this would imply the need for humanity to engage critically with contextual realities (“social world”) with the objective of discerning, as a collective (across boundaries), what is common good for all involved (participants) and the community or organisation at large.

In doing the above, individual members involved would be availed with opportunities to develop in skills and knowledge to do “reflective systemic analysis” (Warmington et al., 2005, p. 5) as a stepping stone towards organisational or community transformation. According to Vygotsky, as applied to socio-cultural theorists who came after him like Engeström (1987), critical realists like Bhaskar (1998) and Archer (2003), and educational management theorists like Lumby (2013) and Gillies (2013), therein lies the authentic meaning of *being*: transformation in all its variations as presented in studied literature (Chapter Two) which include “transformational”, “transformative”, “authentic living”, “liberation” and “empowerment”. In Chapter Eight, these concepts are used to describe emerging models of clergy leadership formation in the study.

Underlying the considerations above are the principles of the conceptual framework which guide and shape this study as explained in previous sections. Enfolded in the discourse is the expansive learning concept which is the objective of CLWs (refer to 2.3.3.3.3; 3.4.4; 6.2; 6.3). In view of the emphasis placed on the Vygotskian theory in Section 7.2.2, the motive behind expansive learning exercises such as CLWs is to engender processes where “*man* through his actions mediates, regulates, and controls his material exchange with nature” (Habermas, 1971 as cited in Holt et al., 1993, p. 102). On the other hand, one is cautioned to always bear in mind that what comes into being (structure) as a product of human creativity (agency) becomes social capital (*habitus*) which can only be reproduced or transformed through on-going human social engagements (Foucault, 1988; Hays, 1994; Hayward, 1998; Archer, 2003; Gillies, 2013; see Figure 2.3; 2.13).

In keeping with the guidelines of the consolidated conceptual framework of the study, CLWs which were facilitated as presented in Chapter Six, followed the sequence of the ELC up to Action 4 (refer to 2.3.3.3.3). In the next sections, I do a combined analysis of each phase of expansive learning for the two case studies used in the study. The analysis is undergirded by the Vygotskian theoretical emphasis which is understood and considered as the foundation of the conceptual framework which guides and shapes the study as has already been elaborated in the chapter.

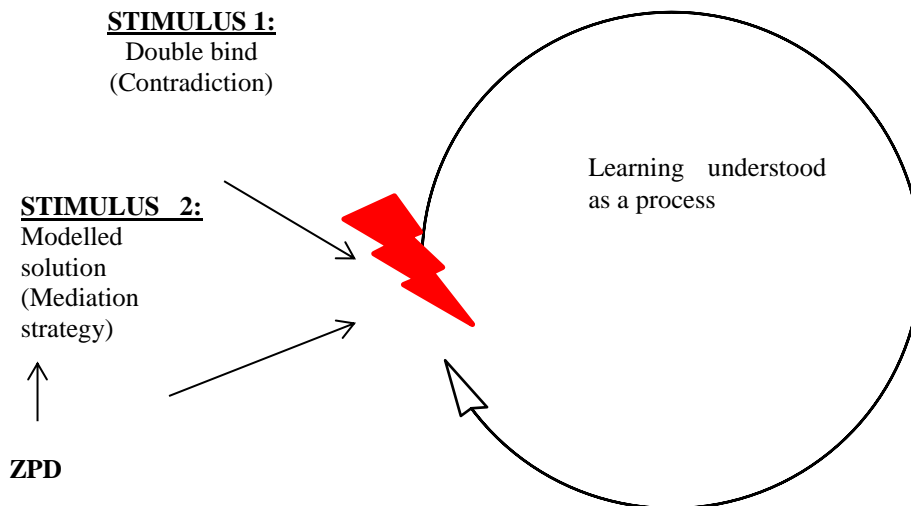
#### ***7.2.4.1 Common CLW considerations and procedures across the case studies***

The diagram below (Figure 7.2) is an illustration of the development of Engeström's (1999) conceptualisation of double stimulation which is founded in what has been emphasised about Vygotsky's theorisation of human cognitive development in earlier sections of the chapter.

The diagram illustrates a number of the concepts used by Vygotskian theorists to develop Vygotsky's initial conceptualisation of human cognitive development. For the purposes of this discussion, the following concepts will be used to analyse the different phases of the CLWs as facilitated in the study (refer to Chapter Six): double bind, double stimulation, ZPD, cultural interpretation and collectivist interpretation (refer to 7.2.2.1 and 7.2.2.2).

The preliminary preparations for the study done (see Chapter Three) were in keeping with Vygotsky's conceptualisation of cultural mediation as explained earlier in the chapter. This brings into the fold the considerations relating to the appropriate sites to collect data and the relevant people to request to be involved in the research processes, bearing in mind the object of the study; when (timing) it would be most appropriate to involve the prospective participants in research activities in both the exploratory and expansive learning phases of the study; and how much time the whole process would require as this involved people who had full time work responsibilities.

These deliberations could not have been done randomly as doing so would have jeopardised the chances of meeting the set purpose, goals and objectives of the study. For instance, the decision to organise focus groups in selected dioceses in ACSA which were composed of individuals who would be involved in the TfM annual consultations at Cott (see Section 3.3) was a strategic way of maximising informed and reflective participant input into the research processes. In relation to Vygotskian conceptualisation, such a consideration would relate with the concept ZPD as explained earlier in the chapter.



**Figure 7.2: Illustration of Engeström's (1999) concept of double stimulation (applied in Chapter Eight)**

Vygotskian theorists discussed earlier in the chapter would argue that the above explanation demonstrates the need to consider “organism” (human being) and “environment” (social context; social world) as “disembodied entities” (Scribner, 1997 as cited in Yamagata-Lynch, 2010, p. 15) in human action. Such an understanding aptly connects with what was necessary to consider before embarking on the actual research process bearing in mind the focus of the study and the conceptual tools selected to frame the whole research process. These considerations fall in line with the role of the MKO<sup>95</sup> in Vygotsky's ZPD concept as explained in earlier sections of the chapter. Vygotsky asserted that it was on the basis of such considerations that human consciousness development in learners was enhanced (Vygotsky, 1978). In the case of this study, the subject was facilitation of clergy leadership formation programmes and activities in ACSA and the participants were qualified individuals with leadership responsibilities in the said activities.

In figurative language, the first phase of the expansive learning process could be understood as *ground-breaking* interaction between the researcher (who was also playing the role of an interventionist – see 7.4) and the participants. The brainstorming and enquiring interaction leads to a “double bind” (encountered contradiction(s) between what was perceived to be and the reality on the ground) which is “Action 2” on Engeström (1999)'s ELC (refer to 2.3.3.3.3) which brings to the fore the critical realist under-labouring ontological acknowledgement of

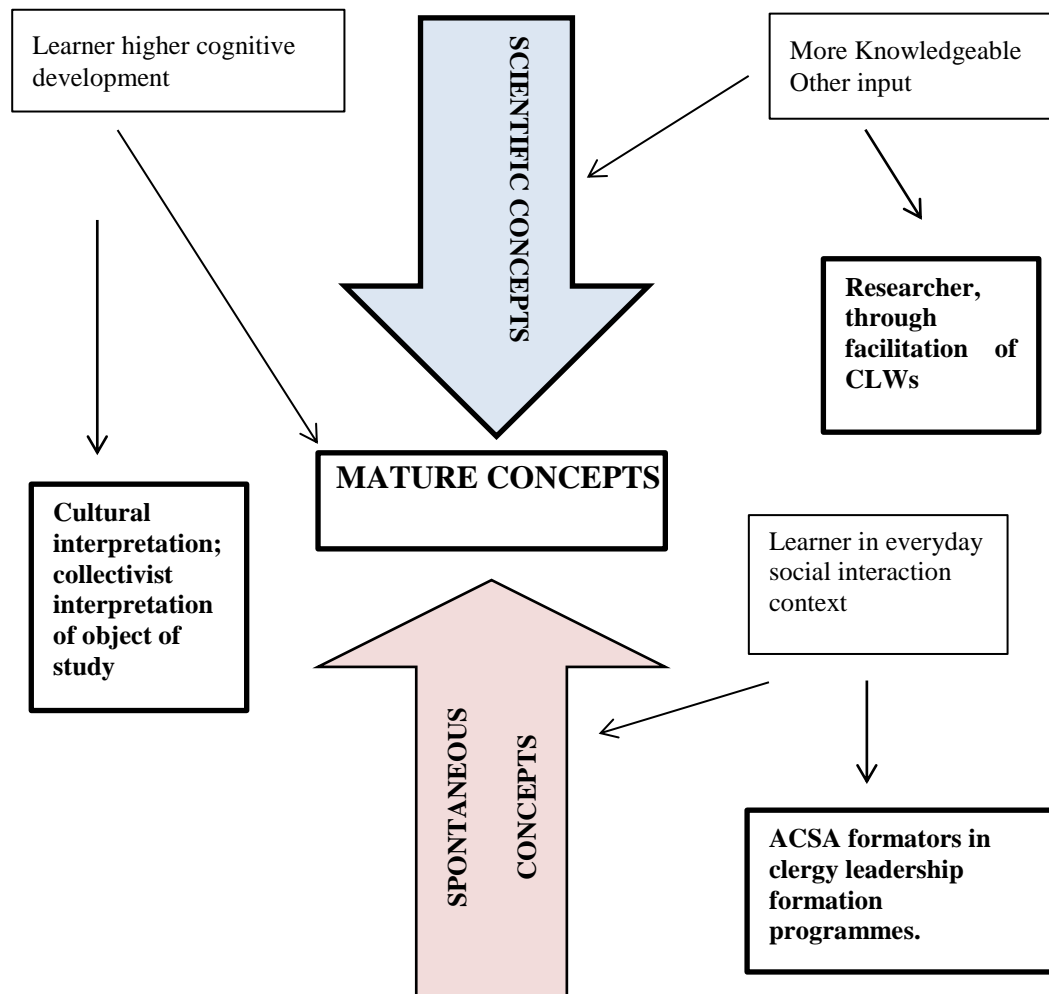
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<sup>95</sup>In the case of this study, I was the MKO in terms of research processes and not necessarily in terms of knowledge and expertise in the area of clergy leadership formation programmes and activities in ACSA (refer to 3.6 – ethical considerations).

the existence of a world independent of our knowledge with structures which generate causal mechanisms when triggered (Danermark et al., 2002; Ackroyd & Fleetwood, 2000).

Accordingly, in both case studies used in the study, the participants were introduced to the purpose, goals and objectives of the study on the basis of what they already knew and were familiar with about the subject of clergy leadership formation programmes and activities in ACSA (refer to 6.2; 6.3). This entailed, on the part of the facilitator, the need to use appropriate and relevant interactional tools (artefacts) and methodologies in order to enhance the participation, interest and understanding of the participants. It had been anticipated that the participant interactions would create a “double bind” which would have required collective effort (“double stimulation”) towards modelling a solution on the contradiction(s) encountered.

In both case studies, carefully structured questions with undergirdings of the conceptual framework employed in the study were used at the introductory and subsequent sessions. The questions created opportunities for the participants to either discuss the questions in small groups or as a collective and, in both cases, agree on what they felt were the relevant responses to the questions given. They would then give feedback to the facilitator who would note down on a flipchart the key issues emerging from the presentations for further deliberations. Additionally, in keeping with the Vygotskian conceptualisation about human consciousness development as a social phenomenon, participants were given opportunities to ask questions on any aspects of the deliberations which they did not understand. For instance, Cott participants sought clarity on suitability of the critical realist philosophical approach for a study contextualised in the church. The response which I gave emphasised the *function* assigned to this particular research theoretical tool in relation to other theoretical and methodological tools employed in the study to gather data from which meaning could be deciphered (refer to 6.3.2).



**Figure 7.3: Modelling an analytical tool on human consciousness development after Vygotsky (1987) for application on ACSA clergy leadership formation programmes and activities**

In Vygotskian parlance, the interactional activities done during the data collection processes and CLW facilitation bring together what may be termed *two worlds* of perceiving the phenomenon under discussion in the sense that, because the ensuing deliberations are coached by specialist language, what Vygotsky calls “tools” or “signs” (1978, pp. 54-55), they ascend to an advanced level of “mental functionings” beyond the everyday, general discourse (illustrated in Figure 7.3). As a result, learners who, in the case of this study are facilitators of clergy leadership formation programmes and activities in ACSA, developed mentally and otherwise about the subject matter under discussion, what Vygotsky (1978, p. 55) calls “psychological activity”.

Underscored above is the understanding that the Vygotskian psychological theory considers human cognitive development as a means to an end, the latter being “human consciousness development” in a broader sense, otherwise expressed in the conceptual framework used in

the study as authentic transformation; liberation; transformative and transformational states of being (refer to 2.2, 2.3; 2.4; Chapter Eight; see Table 2.1). In Section 7.2.4.5, I discuss how cognition, context and practice relate to expansive learning in the facilitation of clergy leadership formation programmes and activities in ACSA; a theoretical movement from the individual domain (Vygotsky based) to a collective or community of practice domain (Engeström's expansive learning concept) (Vygotsky, 1978; Engeström, 1987).

Power-point presentations were also used as mediational artefacts particularly in activities where the participants were informed of the theoretical and methodological tools used in the research processes; key issues which would have emerged in the interactional activities, particularly at the beginning of a subsequent session. This was done to ensure that participants were reminded of what would have been emphasised in previous sessions and how those issues connected with on-going deliberations on the subject matter under consideration: clergy leadership formation programmes and activities in ACSA. The same facilitation resource was also used to inform participants of *mirror data* which helped with reinforcing the contributions given by participants or giving clues of how some of the issues under discussion could be explored or interrogated further. In critical realist parlance, *mirror data* affirms the philosophical argument that there are many and different ways of perceiving reality, thus opening opportunities for expansive learning.

#### ***7.2.4.2 Unique aspects of CLWs between case studies***

Based on the considerations explained in Section 7.2.2.1 and 7.2.2.2 about the Vygotskian theory particularly in relation to the pedagogical requirement to create conducive teaching and learning environments for diverse groups of learners, it was necessary to consider certain factors that made the two case studies used in the study distinct even though they were both responding to the same research object, clergy leadership formation programmes and activities in ACSA.

The issue of organisational readiness for the expansive learning process in the two case studies was one of the critical issues that needed to be looked into in the preparatory phase of the study. The contexts represented by the two case studies differed in a number of ways but also had numerous areas of similarity as indicated in the previous section. Regarding the ACSA ministry and training case study, there was already in existence a group of formators from different dioceses in ACSA who assembled at Cott every year in November for

consultations on issues relating to clergy leadership formation, ministerial practices and training in ACSA (TfM) (refer to 1.2.2).

As such, organising focus groups, interviews and CLWs with the group did not present me with difficulties as they were already in the mould of an ideal research community for a study such as the current one. However, as alluded to in the previous section, one of the challenges that was encountered in working with a group of people who were already in discourses similar to the focus of the study, was to select appropriate facilitation approaches for expansive learning interactional activities which, in particular, would ensure the participants that the engagements were adding value to their ministerial experiences and what they already knew about the subject under discussion.

In contrast to the above, the dynamics in the Cott case study on the issue in question were different. The critical issue which called for negotiations with the organisation was the change of leadership in the course of the research process. On consideration of the invaluable contribution the study would give to the organisation and ACSA in general, helpful guidance had been given on how the expansive learning process could be facilitated in the organisation in alignment with organisational programmes with almost similar intended ends already in place (refer to 3.4.3). However, as explained in Section 6.3, once the expansive learning activities had been planned as had been advised and accordingly informed of the organisational members, there was a huge interest to be involved in the CLWs.

The emphasis on the need to consider context as the fundamental determinant of the object of collective human engagement in Vygotskian theorisation (1978) and the socio-cultural historical theorists who came after him like Engeström (1987), was practically demonstrated in the manner in which the two case studies deliberated towards surfacing contradictions experienced in clergy leadership formation programmes and activities in ACSA and modelling of solutions to the surfaced contradictions. A key issue which was used as an analytical and methodical tool in the ACSA case study expansive learning activities was the history of clergy leadership formation programmes and activities in ACSA (refer to Section 5.3 & 6.2) which, as discussed in Section 2.3.3.3.3, relates to what Engeström (2011) calls *formative interventions* within which is deliberated the concept of *concept formation*.

In the Cott case study, historical considerations of the object of expansive learning activities, curriculum review and enhancement, was a spin-off deliberation related to review of the

Vision and Mission Statement of the organisation which placed theological education in the centre of all organisational programmes and activities (refer to 5.4 and 6.3). As such, it became necessary to involve learners at Cott (who were not yet ordained) in some of the interactional activities as they were a critical contributor to all deliberations related to curriculum design, implementation, assessment and evaluation.

The Vygotskian concepts constitutive of his philosophical conceptualisation of human consciousness development, what he calls “psychological activity” (1978, p. 55) such as ZPD, cultural interpretation and collective interpretation, relate to the manner in which CLW processes and activities were planned and facilitated in the study, thus demonstrating the extent to which the selected theoretical and methodological tools in the study were effective in framing the development of the goals and objectives of the study.

In Chapter Eight, I discuss how the Vygotskian theory which has been considered as the foundation of the theoretical and methodological tools used in the study, has established effective conceptual tools which could be used to engage new practices in clergy leadership formation emerging from the expansive learning processes which were facilitated in the research process. This implies elevation of the place and role of conceptual tools in professional work and organisational processes/cultural practices such as clergy leadership formation programmes and activities as practised by ACSA (Engeström, 1987; Engeström & Sannino, 2010).

#### ***7.2.4.3 Critiquing the Vygotskian theory***

Wertsch and Tulviste (1992, p. 555) observe that “although there is widespread agreement that Vygotsky’s ideas are extremely rich and have major implications for contemporary research in developmental psychology, there are also major differences among authors over how these ideas should be understood and applied”. In other words, Vygotsky’s work has and continues to receive different responses from people of different academic or professional orientations.

For instance, an observation has been made that even though Vygotsky’s idea of the ZPD is attractive and usable in its simplicity, he did not quite explain how it might be applied effectively in classroom situations. One is left to think that Vygotsky assumed that other learning theorists would or had already covered that aspect of pedagogy and so limited his

focus to elaborating the principles of the theory (Shayer, 2002). Vygotsky's ideas are out there and people use them as they deem relevant to their needs, academic or professional, which qualifies Vygotsky's philosophical ruminations classic and timeless (Wertsch & Tulviste, 1992).

The openness for interpretation and application made Vygotsky's work available and accessible for use as the foundation of the theoretical and methodological tools which form the conceptual framework used in this study. It has been demonstrated in the chapter that the portability and applicability of the Vygotskian related concepts such as ZPD, double stimulation, cultural interpretation and collectivist interpretation (refer to 7.2.2.2) guided and strengthened the research processes of the study in the following ways:

(i) created enabling and collaborative expansive learning environments in each of the two case studies which were facilitated in the study;

(ii) provided participants with knowledge which has potential to translate into practical skills in their continuing work as formators in clergy leadership formation programmes and activities in ACSA which, as a result of the CLWs which were facilitated in the study (refer to Chapter Six), would require them to take the organisational renewal and transformational programme further with a focus on the modelled solutions in each of the two case studies (refer to Chapter Eight).

Two illustrations drawn from Vygotsky's work could be used to demonstrate what his critics have identified as grey areas in his theorisation. The first illustration relates to his conceptualisation of "lower mental functionings" and "higher mental functionings" (1978, pp. 52-57). His critics have enquired whether it was his opinion that acquisition of the latter would have meant the non-existence of the former. Related to this observation, Vygotsky's critics observe that he seems to have emphasised in his theory the opinion that "development comes from outside the individual (thus leaving) little room to consider the role of the active individual" (Wertsch & Tulviste, 1992, p. 554), thus bringing into question the ability of individuals to exercise agential subjectivity in learning encounters. In addition, this would cast doubt on the level of preparedness of the recipients of the learning processes. However, other critics have accorded Vygotsky the benefit of the doubt in response to this criticism by assuming that, because he observed "mediated action" (Vygotsky, 1978, pp. 54-55) as the basic form of interactional processes in teaching and learning contexts, he implicitly

acknowledged potential in individuals to make contributions to their learning activities and not rely completely on the MKOs input (Wertsch & Tulviste, 1992, p. 555).

In previous sections in the chapter, I explained Vygotsky's theorisation of the ZPD as suggesting a movement in learning theory from an individual focus to a broadened and deepened consideration of the interaction between cognition, context and practice which, fundamentally, is the motive behind the expansive learning concept postulated by Engeström (1987). The emphasis of collective effort in expansive learning processes elevates collaborative practices (collectivist interpretation) above individual participation (agential subjectivity) but without necessarily suggesting that the latter becomes insignificant (refer to 2.3.3.3.3). Understood thus, the Vygotskian conceptual framework was considered relevant and helpful in developing the goals and objectives of the study whose focus is located in church (ACSA) related leadership formation programmes and activities.

The second illustration relates to issues of power dynamics in the teaching and learning interactions implied in Vygotsky's conceptualisation of the ZPD. Even though Vygotsky does not leave his readers in doubt about his theoretical convictions that effective human cognitive development is socially mediated (1978), the mere fact that the interactions in question involved a MKO and a novice suggests imbalance of power which is not necessarily limited to the participants in the interaction, but also involved a third voice: authority embedded in the manner in which the teaching and learning processes were organised and managed (Tarulli & Cheyne, 2005).

In relation to the study, the power dynamics between the researcher (interventionist) and the research participants were explained in Section 7.2.4.1 (also refer to 3.6). However, the reference to external forces of power and control in the critique levelled against Vygotsky's theory brings to the fore the critical realist postulation of the three levels of reality which emphasise in particular the domain of the real whose casual powers are located in structures which, in the case of ACSA clergy leadership formation programmes and activities would include policies, canons, positions of responsibility such as those accorded to bishops and formators of clergy leadership (refer to 2.3.3.3.3). As such, it was on the basis of this critical realist theoretical awareness that I planned, facilitated and managed research processes with reflexivity, particularly expansive learning activities (refer to 7.2.6).

### 7.3 PARTICIPANT REFLEXIVITY DURING CLWS

Since the study involved experienced, knowledgeable and hands-on participants in clergy leadership formation programmes and activities in ACSA, it was necessary to include in the discourse Mezirow's (2000) thoughts on adult engagement in educational programmes, as well as organisational work practices which require on-going individual reflexivity<sup>96</sup>. Mezirow, an adult educationist who was conversant with educational needs and challenges in developing countries in terms of planning, facilitation models, and management structures and processes, was selected in this study on the basis of how his work complements the Vygotskian theorisation of human cognitive development (1978) and, beyond Vygotsky, Engeström's (1999) ELC.

After having been influenced by educational theorists like Paulo Freire (1972) and Jurgen Habermas (1981) who are renowned for their input on the theme *transformation* in educational programmes, Mezirow (2000, pp. 3-4) postulates a theory on transformative learning which he defines as:

a theory of deep learning that goes beyond just content knowledge acquisition, or learning equations, or learning historical facts and data ... a desirable process for adults to learn to think for themselves, through emancipation from sometimes mindless or unquestioning acceptance of what we have come to know through our life experience, especially those things that our culture, religions, and personalities may predispose us towards, without our active engagement and questioning of how we know what we know.

It is evident in the quotation that Mezirow's transformative learning theory emphasises conscientisation of the marginalised, openness to alternative points of view, and the need for full participant involvement and self-critical reflexive deliberations in collective work engagements such as clergy leadership formation programmes and activities which are the object of this study. Accordingly, Mezirow's perspective on adult learning aligns with the conceptual framework of the study whose orientation is transformational, transformative, empowering and liberative (refer to Chapter Two).

Considerations were made during the CLWs to give opportunities to participants to reflect on what would have been covered during the expansive learning sessions, particularly in

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<sup>96</sup>Reflexivity in this chapter is discussed in relation to participant involvement in CLWs as presented in Chapter Six while in Chapter Eight the concept is discussed in relation to models of clergy leadership emerging in the study.

between sessions. Also, participants in both case studies were invited to correspond with me in between sessions if they had any after session thoughts or would have come across information on the object of our deliberations which they would have considered important to share with me before the next session. Further, this allowance was enhanced by starting all subsequent sessions with reflective questions and deliberations which were intended to assist participants to make connections between previous engagements, their reflections in between the sessions, and on-going deliberations.

The challenge encountered with allowing participants to share reflexive deliberations in the expansive learning interactional processes was that, because individuals would have had ample time to ponder on issues of deep interest to them about the object of the expansive learning processes, these engagements were not always smooth sailing as would have been planned and intended. For instance, individuals in the Cott Case study had passionate convictions about what they considered critical and of primary importance in curriculum related matters while in the ACSA ministry and training case study, understandings of clergy leadership, particularly the responsibility conferred on a bishop, received diverse individual preferences about clergy leadership formation in ACSA to an extent that at one of the focus group discussions done in the exploratory phase of the study almost deteriorated as two participants argued passionately about a particular aspect relating to pastoral leadership in the context of ACSA (refer to 2.4.3; 6.2.6.1; 6.2.6.2; 6.3.6; 6.3.7).

However, considered from the perspective of the framework of human cognitive development (Vygotsky, 1978) and Engeström's (1999) conceptualisation of the expansive learning process, the contradictions in understandings and preferences in the CLW interactions affirmed the relevance and practicality of Edwards' (2007) postulation of what she calls the three phases through which learning happens and the five principles of the CHAT framework as expounded by Engeström (1987; 1999; 2001a) (refer to 2.3.2).

#### **7.4 IMPLICATIONS OF RESEARCHER STATUS IN THE STUDY**

In Section 3.5, I explained briefly the ethical implications of my insider/outsider researcher status on the validity of the research findings for the study. Because the study was done within a qualitative research design and a conceptual framework informed by CHAT, critical realism and educational leadership theory as explained in previous sections of this chapter and detailed in Chapter Two and Three, it was imperative that I bore in mind throughout the

duration of the study the need to be impartial in the manner that I collected and analysed data. As such, the issue (insider/outsider researcher status) required more attention in the study in addition to the explanation given in Section 3.5.

A starting point in this analytical discussion is to revisit some of the interactional sessions which I had with research respondents in focus group discussions to ascertain how I positioned myself as an insider researcher.

### **Focus group-based questions from Chapter Five**

- **Focus group Cfg3 – Extract 1**

*(i) What is your understanding of the core business of Cott? Why does the College exist?*

*(ii) You seem to imply that there is a need to differentiate process and function or responsibility in the conceptualisation of the core business of the College. Would you please shed some more light on that?*

- **Focus group Cfg4 – Extract 2**

*(i) Focus group Cfg4: Why is it important for Cott to add an experiential learning programme to the curriculum?*

Drawing from the conceptual framework which informs the study, these are questions imbued with epistemological and ontological assumptions or understandings which I as the researcher, despite being an insider, could not have pre-determined prior to receiving responses from respondents.

Further, an analysis of some of the literature on the issue in question (insider/outsider researcher status) would help to give emphasis to an explanation of the manner in which the dilemma was handled in the study. Table 7.1 below presents scholarly postulations which attempt to differentiate views about the two sides of the issue: insider researcher vs outsider researcher views.

**Table 7.1: Views about insider/outsider researcher from Adler and Adler, 1987; Brannick and Coghlan, 2007; Dwyer and Buckle, 2009. (Source: Chinganga, 2010)**

<b>INSIDER RESEARCHER</b>	<b>OUTSIDER RESEARCHER</b>
Has the advantage of pre-understanding of the participant organisational culture, processes, and structure related issues.	Has the challenge of establishing relationships with organisational participants and familiarising with the context of the host organisation.
Has the advantage of access to significant information relevant to the research.	Outsider researcher is better placed to make sense of the bigger picture of organisational experience; with no biases since one has no vested interest in the participant organisation.
Has the advantage of already existing social, intellectual, professional and emotional relationships with organisational participants. However, these can also militate against the researcher's interests. For instance, would one write negatively about one's organisation or friends in the final thesis report?	Since people are not always what they appear to be, an outsider may be able to distinguish between genuine and false organisational participant behaviours.
Has genuine commitment to the research programme and so is prone to frustration if the research goals should not be achieved.	Outsider researcher is better placed to deal objectively with own feelings and emotions about the research experience, particularly when it comes to an analysis of research findings.
Has the challenge of adding a research role to a pre-existing role in the organisation. One becomes a practitioner – researcher which can cause confusion particularly when it comes to dealing with difficult issues in the course of the change intervention process, for example conflicts between participants. Another area of great concern here is the analysis of research findings. For instance, researcher might emphasise areas of agreement with participants as opposed to those of difference.	Outsider researcher may capitalise on neutral status to deal with difficult issues during the course of the facilitation.

On many considerations, the tabled views apply to what governed the parameters and decisions that needed to be made in the planning, facilitation and management of research processes of the study. The critical issue that stands out in relation to the *insider researcher* side of the discourse, which defines my status in the study, is in connection with researcher familiarity with cultural practices, systems, processes, and personnel constitutive of the organisation one is researching, and for which one is an employee. Theoretically, the observations made, and concerns raised in this analytical discourse on the issue are sound. Again, considered on the basis of the conceptual framework informing and guiding the study, I could not claim complete knowledge of what organisational members thought about the object of study, hence the decision to select data collection methods for the study which enabled me to observe the following issues in my planning, facilitation and management of research processes (refer to 3.4):

(i) Respect of participant views, acknowledging the fact that the individuals (whether student or formator), were already familiar with the traditions, values, and cultural practices of ACSA in theoretical and practical terms, particularly issues that related to clergy leadership formation programmes and activities (refer to discussion on Mezirow's theory – Section 7.4). In doing so, I observed the understanding that “human beings, through experience of the world and other people, construct their own realities and make their own meanings” (M Ed, ELM Lecture notes, *Introduction to research orientations*, 2009). As explained in the previous section, Archer (2003) understands such human abilities as a phenomenon of the exercise of agential reflexivity.

(ii) Acknowledge the existence of different models of clergy leadership in ACSA which, correspondingly, imply the existence of different models of facilitation of clergy leadership formation which the study sought to ascertain and from which, to explore collaborative practices that could be expanded through learning. The critical realist emphasis of the existence of underlying mechanisms with causal properties at the level of the “basal” (real; structures) (Ackroyd & Fleetwood, 2000, p. 5) was helpful in making this research consideration (refer to Section 2.2).

(iii) Create opportunities for the practical implementation of the “multi-voicedness” principle of the CHAT framework (refer to Section 2.3). This entailed accepting vulnerability on my part as a researcher as one would not know in advance what participants would think or say either in response to the focus of the study or what other participants would say in interactional discussions. For instance, in one of the focus group discussions with ACSA ministry and training case study participants, I had to exercise patience in response to what had almost become a mantra regarding an individual participant opinion about the scope of the study. Repeatedly, the statement “*Percy, you need to narrow your scope*” was said by the same participant despite the detailed explanation that I had given on the issue in my introduction and in response to the first mention of his opinion. Luckily, one of the participants in the group added to my explanation by stating that the scope for a PhD study should be wider than what would be required of a Master's degree research design which most of the participants in the group were familiar with. Encouragingly, the second participant had also indicated that he had been impressed with the design of the research process and could not wait to read the completed study.

In connection with the above, it required of me, in the first instance, to consider with criticality (theoretical level) what skills to employ in the research processes and, in the second instance, to anticipate being confronted with the unknown (practical level) throughout the duration of the study. Drawing from Burke (1982, pp. 23-24), the following researcher skills (mediational artefacts) were reflected upon and implemented in the study:

(i) The ability to influence and not coerce participants. As an example, this was a helpful skill in the negotiations that I did with the Cott leadership to allow me to facilitate CLW sessions even at a time when the organisation had embarked on a scheduled programme with similar goals to those of the proposed CLWs (refer to 3.4.3; 6.3).

(ii) The ability to confront difficult issues (refer to 3.4.3).

(iii) The ability to mobilise human energy (see Figure 6.2, 6.3, 6.4, 6.5, 6.6).

(iv) The ability to teach or create learning opportunities as advised by Mezirow (2000) (see Figure 6.2, 6.3, 6.4, 6.5, 6.6; refer to 6.2; 6.3).

(v) The ability to listen more attentively and generatively, aided by probing questions and participant discussions, thus observing and applying the tenets of Vygotsky's theory as discussed in previous sections in the chapter.

In these considerations, I acknowledged the scholarly opinion by Dwyer and Buckle (2009, p. 61) about research done within the qualitative orientation, which was the case with this study:

Just as our personhood affects the analysis, so, too, the analysis affects our personhood. The intimacy of qualitative research no longer allows us to remain true outsiders to the experience under study and, because of our role as researchers, it does not qualify us as complete insiders. We now occupy the space between, with the costs and benefits this status affords.

The quotation reiterates the understanding emphasised in qualitative based research that collected data ought to be handled *sui generis* (in its raw form); allowing it, in analytical processes, to explain, justify, explain and persuade those handling it to create social categories representative of perceived reality (Janks, 2001). The conceptual framework tools which were used in the study to sift meaning from collected data were selected on the basis of this understanding, thus prioritising research findings ahead of researcher inclinations on the object of the study.

## **7.5 CONCLUSION**

The chapter has demonstrated the extent to which the theoretical and methodological frameworks which were used in the study were effective in guiding the researcher to organise, facilitate and manage research processes and deciphering meaning from data collected. In relation to Vygotskian theorisation, it was argued in the chapter that the transformatory paradigm which defines the theoretical and methodological tools used in the study, namely, critical realism, CHAT, and educational leadership theory (refer to Table 2.1) is founded in Vygotsky's philosophical theory of human cognitive development (1978). Therefore, for analytical purposes in the study and for future participant engagements in responsibilities as formators in clergy leadership formation programmes and activities, particularly in response to the modelled solutions to surfaced contradictions in the two case studies used in the study, the theoretical and methodological frames, consolidated, birthed a conceptual framework rooted in Vygotskian philosophical theorisation which helped to broaden and deepen analytical processes in the study beyond CLW activities.

Chapter Eight demonstrates how the participants could implement the conceptual framework in their collective efforts to expand ascertained (through expansive learning processes and activities) embodied, collaborative and transforming models of clergy leadership formation in ACSA.

## CHAPTER EIGHT: REFLECTIONS ON EMERGING MODELS OF CLERGY LEADERSHIP FORMATION IN ACSA

### 8.1 INTRODUCTION

On the basis of the conceptual framework of the study, the chapter critically engages the emerging models of clergy leadership formation in ACSA, drawing information for engagement and illustration from Chapter Four, Five, Six, and Seven. The first part of the chapter, in line with the problem statement of the study as explained in Section 1.3 and the research question: *What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?* discusses collaborative and transforming models of clergy leadership formation practices in ACSA which are evidenced in data (*mirror data* and CLW findings). The objective of the engagement is to establish how, in the continuing work of the organisation (ACSA), particularly with the informed input of the research participants, the identified collaborative and transforming models would be expanded.

The focus of the second part of the chapter is to use the conceptual framework carved in the study to demonstrate how participants could practically apply the knowledge learnt through CLWs in their continuing practices, thus responding to the sub-research question: *What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive learning process interactions?*

At a *meta* level, the analytical discussions in the two sections of the chapter will be guided by the research question: *What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?* I use inductive, abductive and retroductive modes of data inferencing in the analyses.

The organisation of the chapter is in alignment with Engeström's (1987, p. 125) explanation that "the essence of expansive learning activity is production of objectively, societally new activity structures (including new objects, instruments, etc.) out of actions manifesting the inner contradictions of the preceding form of the activity in question". It can be argued that this understanding is rooted in Vygotsky's (1978) assertion that learning precedes development (refer to 7.2.2). In relation to expansive learning processes which were

facilitated in the study, formators in clergy leadership formation programmes in ACSA were empowered with new knowledge about their practice(s) in a holistic sense which, on implementation in their continuing practices, would effect change in organisational cultural practices; the first relating to transformation of practitioners' "reflective systemic analysis" and the second "change in organisational culture" (Warmington et al., 2005, p. 143). In relation to the second, Engeström et al. (2010, p. 8) explain that "successful expansive learning leads to a qualitative transformation of all components of the activity system" which, in the case of the study, implies clergy leadership formation programmes, activities and processes which are facilitated through the agency of the activity systems used in the study (refer to 1.2; see Figures 3.1 and 3.2).

The next section critically engages the emerging clergy leadership formation models in ACSA towards establishing and affirming collaborative and transforming models which could be reinforced through the continuing involvement of formators (participants who were involved in the study) in ACSA clergy leadership formation practices.

## **8.2 ENGAGING EMERGING MODELS OF CLERGY LEADERSHIP FORMATION IN ACSA**

### **8.2.1 Conceptualisation of clergy leadership formation in ACSA**

Concepts are of vital importance in expansive learning processes. This is attested by Engeström et al. (2010, p. 2) when they asserted that "in expansive learning, learners learn something that is not yet there. In other words, the learners construct a new object and concept for their collective activity and implement this new object and concept in their practice", hence the notion "concept formation" (Engeström, 1987). The concept "clergy leadership formation" is central to a conceptualisation of the object of the study as discussed in Section 1.2 and 6.2.3.1. Participant deliberations which were done during CLWs in the study (refer to 6.2 and 6.3) and *mirror data* which was used at the sessions reveal that "clergy leadership formation" was understood differently in ACSA. As mediation strategy for the apparent "double bind", CLWs in the study created opportunities for participants to deliberate ways of resolving the conflicting views about the concept with the objective of constructing a collective understanding with relevance in ACSA.

In the process of the CLW deliberations, the root causes (causal mechanisms) of the conflicting understandings of the concept were revealed, thus creating an impetus for the

participants to work collaboratively towards transforming models of clergy leadership formation practices in ACSA. I present below examples drawn from research findings to illustrate participant diverse views about the concept, probable causal mechanisms of the diverse views, and participant opinion of transforming understandings of the concept.

**Table 8.1: An analysis of participant views about the concept clergy leadership formation using a critical realist lens**

Participant views drawn from data	Probable causal mechanisms	Participant suggestions of transforming views
<p><i>.We keep restating our desire for spiritual and moral formation, but we continue to be bedevilled by the status seeking “prince priest” model rather than emphasizing contextually rooted models of clergy formation. Perhaps we need to design and frame our programmes more in the model of Theological Education by Extension. [Aint2] (Table 5.1)</i></p> <p><i>.I can tell you that I have an experience of clergy in the responsibility of training rector who have no interest in engagements in the ever evolving theological trends in relation to the developments happening every day in the world ... not to talk about both clergy and bishops who are contended with the basic qualification in theology (Diploma in theology) which they obtained because it was a requirement for ordination. [Aint3] (Table 5.1)</i></p>	<p><b><u>Historical factor</u></b></p> <p>Drawing from Chapter Four of the study, particularly from the narration of the events beyond the Reformation period (section 4.3) to the present day, these participant views testify that there have been diverse views about the concept <i>clergy leadership formation</i> throughout the history of the Anglican Church, ACSA in particular (refer to Tables 6.1 and 6.2). As a result, clergy leadership has been and is understood to mean different things for different clergy in different contexts of the Anglican Church, ACSA in particular. The analysis in Chapter 4 of the unfolding events in the history of the Anglican Church reveals that contextual historical circumstances have a strong bearing on understandings of and, resultantly, clergy leadership practices (refer to Figures 4.1, 4.2, and 4.3). I discuss critically the influence of the history of the Anglican Church on ACSA clergy leadership formation practices in Chapter 9.</p>	<p>.More clergy exposure to different ministerial contexts in ACSA and abroad. ACSA has diverse contexts suitable for that need. <b>(Table 6.3)</b></p> <p>.We need church leadership that is deeply rooted in Anglicanism, placing emphasis on knowledge; practices and values. Each parish in ACSA should run an educational programme based on these three pillars, possibly starting with the Sunday school. This will ensure that the traditions of the denomination will be sustained. <b>[Afg1] (Table 5.1)</b></p> <p>.Clergy leadership formation programmes and activities in ACSA should aim to produce clergy who have the ability to articulate the ills affecting society beyond the bounds of the denomination. Clergy and bishops are too quiet these days. Gone are the days of Bishop Tutu and others of his time. In addition, clergy should be equipped more with skills that enable them to tap and use resources already available in the parishes. <b>[Afg2] (Table 5.1)</b></p>
<p><i>It seems to me that ACSA formation models, approaches and methodologies are biased towards educating and training people for parish ministry rather than church ministries. Actually, you see, this is a misnomer and the possible reason why ACSA is thin in some aspects of her ministries. [Afg4] (Table 5.2)</i></p>	<p><b><u>Agentive factor</u></b></p> <p>A spin-off the historical factor in clergy leadership formation in ACSA is the agentive or agential factor. The diverse clergy leadership formation models which emerged in ACSA were principally spearheaded by particular individual clergy from England, to start with, who, because of their spiritual orientation and the kind of clergy</p>	<p>.Reinforcement of practical theology; contextual application of theology in the work and life of church leaders. <b>(Table 6.3)</b></p> <p>.The facilitation methodology of the Cott academic programme emphasises criticality, contextualisation and interdisciplinary engagements. As such, Cott products are ably equipped to engage with worldly experiences</p>

	<p>leadership formation they had received themselves or none of it, understood and championed clergy leadership formation in a particular way (refer to sections 4.3 and 4.4; Tables 6.1 and 6.2). As a result, generations and generations of clergy in ACSA, which includes those who have been tasked with responsibilities of facilitating clergy leadership formation in their dioceses and ACSA at large, have come through these diverse orientations about clergy leadership formation. However, the study observes that this phenomenon is in keeping with the nature of the denomination from inception (refer to Section 4.3 and 4.4).</p>	<p>with an unbiased informed perspective (<b>Table 6.4</b>).</p>
<p><b>Interviewee 2:</b> <i>Formation is understood at Cott in terms of development of critical thinking skills in students and less in terms of ministerial practice skills.</i></p> <p><i>From a Cott perspective, it is the expectation that dioceses should train students how to lead parishes after their formation time at Cott which is not always guaranteed by some dioceses in ACSA. (Table 5.3)</i></p> <p><i>.Little collaboration between College and authorities who send the students to the College (dioceses) on what is covered in the College academic programme since dioceses have local training schemes from which students who are sent to Cott are drawn. (Table 6.4)</i></p> <p><i>.I am disappointed with the ACSA decision to allow dioceses to have independent training/formation schemes. Through that, what is ACSA saying about formation of clergy? Why the decision to use schemes – it depends with who you ask. Where is ABoTE in all this? [Aint5]</i></p>	<p><b>Structural factor</b></p> <p>Participant views reveal that there was minimum collaboration between Cott (the only seminary in ACSA) and dioceses which send students to the College for formation. The question that arises in view of this state of affairs in the organisation is why dioceses, which constitute ACSA, and Cott, an important <i>structural tool</i> of the organisation (ACSA), do not collaborate enough. The participant view with the code name <b>Aint5</b> points us to what may be the fundamental reason why dioceses and Cott are not as close to each other as would have been anticipated given the important roles each of the structures play in upholding, championing and developing the Vision and Mission of the organisation (see Annexure 3.1) which they are part of (ACSA) (refer to Tables 6.1 and 6.2; Figures 6.2, 6.3, 6.4, 6.5, and 6.6).</p>	<p>.Increased collaborative practices between dioceses and organisations involved in clergy leadership formation programmes and activities in ACSA (involving Cott, TFM, Hope Africa, ABoTE).</p> <p>.Cott management should resuscitate discussions with dioceses on the possibilities of enhancing collaborative working relationships between Cott and dioceses towards a seamless clergy leadership formation programme founded on the goal of designing and implementing a consolidated, integrated and context-based curriculum as a critical component of a holistic clergy leadership formation programme in ACSA. (<b>Box 6.5</b>)</p>

The analysis reinforces the importance of history, agency and structure in organisational work practices. As explained in Section 2.3, the CHAT framework within which the expansive learning concept is located, came about with the influence and guidance of Vygotsky's cognitive psychology theory (1978) (refer to Chapter Seven). Thus, the interplay between structure and agency in relation to the object of study, within the historical framework of the organisation (ACSA), is further strengthened. Therefore, for ACSA to resolve the conflicting perspectives about the object of study in the manner as suggested in the extreme right column in Table 8.1, there would be a need for intentional and strategic deliberations around critical concepts like history, agency, and structure in connection with the subject matter in question: clergy leadership formation. In Chapter Nine I deepen the conversation on how ACSA could use history as an analytical and methodological tool to engage expansively on any issue of interest in the continuing work of the organisation, particularly with regard to the concept clergy leadership formation.

Inherent in the participant suggestions of ways of dealing with the revealed conflicting understandings of the object of study (in Table 8.1) is a model of clergy leadership formation that is contextually rooted; transformational in endeavouring to improve practitioner expertise; transformative in committing to deal with structural issues that continued to perpetuate different forms of misunderstanding across organisational practices in the area of clergy leadership formation. Further, the participant ideas connoted a model of clergy leadership formation that has equal concern for the internal needs of the organisation and those of the broader context in which the organisation is located. This reaffirms Vygotsky's (1978) socio-cultural historical theory as explained in Chapter Seven. Similarly, the *movement* towards "dynamic, relational, inclusive and collaborative" (Bolden et al., p. 259) model(s) of leadership evident in educational leadership theory as discussed in Section 2.4, is implied in the current discourse on an emerging model of clergy leadership formation in ACSA. In relation to this rationalisation of the subject of the object of the study in terms of outcome, Gardner as cited in Bennis (2009, p. 1) asserted that:

Leaders have a significant role in creating the state of mind that is the society. They can serve as symbols of the moral unity of the society. They can express the values that hold the society together. Most important, they can conceive and articulate goals that lift people out of their petty preoccupations, carry them above the conflicts that tear a society apart, and unite them in pursuit of objectives worthy of their best efforts.

Gardner's opinion complements the understanding on clergy leadership formation, clergy identity and clergy ministerial practice which was articulated by the principal leader of ACSA at the time when the study was conducted, Archbishop Thabo Makgoba (refer to 1.2). From the beginning of his tenure in office, Archbishop Makgoba understood the task of clergy leadership formation in ACSA as aimed at producing clergy leaders who would:

- be deeply ethical, moral, and visionary;
- serve the wider community (beyond the walls of the Church) including business, government, and other parts of society that seek moral, ethical, and spiritual direction in dealing with injustice and inequality. (*Report on development of ACSA Vision and Mission Statement*, September 2010)

In relation to the above, the nature and purpose of clergy leadership formation in the Anglican Church Communion (refer to 4.3) and ACSA in particular is clearly captured in the *charge* given by a presiding Bishop during an ordination ritual for a Deacon, the first and fundamental responsibility in clergy leadership in the Anglican Church, as follows:

God now calls you to a special ministry of humble service. In the name of Jesus Christ, you are to serve all people, and to seek out particularly the poor, the weak, the sick and the lonely. As a deacon in the Church you are to study the Holy Scriptures, to seek nourishment from them, and to model your life upon them. By your word and example, you are to make Christ and his redemptive love known to those among whom you live and work and worship. (Anglican Prayer Book, 1989, p. 583)

Ingrained in the *charge* are clergy leadership attributes such as humility, inclusiveness, compassion, holiness, obedience, Christlikeness, exemplary behaviour and faithfulness (Malphurs, 2003). Further, the *charge* communicates the conviction that these clergy leadership attributes form the heart of Anglican Church clergy leadership practice. In a nutshell, the emphasis placed on clergy leadership in the above (*charge*) which, in critical realist articulation would be understood as a structural object with “emergent causal properties” (Archer, 2003, p. 16), aligns with the transformational, transformative, liberation orientated understandings of clergy leadership formation which were deliberated by participants at the CLWs which were facilitated in the study and the emphasis which is articulated in the conceptual framework of the study as summarised in Table 2.1 and explained in Chapter Seven.

In line with the purpose of the study, what comes out strongly in this discourse is the attestation that effective clergy leadership formation for ACSA is guided by values descriptive of the ethos of the organisation. Values, as used in this discourse, imply those things or activities which people or organisations cannot do without; “the *principia* of practical thought” (Hartmann, 2004, p. xvi). A question that could be asked in this regard in connection with participant involvement in ACSA clergy leadership formation programmes and activities is: do the formators understand their organisation enough, particularly regarding matters about clergy leadership formation? CLWs which I facilitated in the study assisted as a mediation strategy to respond to such participant needs.

It can therefore be concluded that, through the transformatory lens of the conceptual framework carved in the study, a relevant model of clergy leadership formation in ACSA is:

(i) contextual, “embodied”, and “incarnated” as emphasised in the Vygotskian conceptualisation of human consciousness development (refer to Chapter Seven; see Figures 2.1, 2.2, 2.3, 5.1 and 5.4);

(ii) founded on transformational and transformative leadership attributes which include critical thinking in response to contemporary issues which may be impacting the work and life of the church in context;

(iii) ethical and morally conscious which finds expression in services rendered to the church and the world at large (refer to Figure 5.2, 5.6 and 5.8).

The concepts “embodied” and “incarnated” are used in theological discourses in connection with the birth, ministry, death, resurrection and ascension of Jesus Christ as narrated in the New Testament of the Bible. In brief, the concepts are used to emphasise that Jesus, the Son of God, came to earth on his Father’s mandate to dwell amongst human beings and experience at a personal level, in human body, what human beings and other forms of creation experienced – good or bad. This is understood as God’s plan to identify with humanity and the Created Order – a God who identifies with humanity at a *personal level*; a God who is approachable, accessible, empathetic, a friend and a comforter. In a nutshell, an understanding of God as “embodied” and “incarnated” is testimony of the selflessness that God is believed to be: a God who is sacrificial for the sake of humanity and the Created Order (Moltmann, 2015).

In relation to the study, “embodied” and “incarnated” reinforce the situated, contextual or context-based model of clergy leadership which emerges in the research data and whose abstraction forms the basis of the conceptual framework which was used in the study (inclusive of educational leadership theory, critical realism, and CHAT; refer to Table 2.1). As such, the understanding of Vygotsky’s (1978) cognitive psychology theory as emphasising “disembodied entities”, in reference to “organism” and “environment” (Yamagata-Lynch, 2010, p. 15), connote “embodied” and “incarnated” understandings as explained above.

The discourse on a preferred clergy leadership formation model (object) in ACSA suggests requirement of formators (subjects/agency) with the requisite knowledge, skills and values (meditational tools) to enable them to facilitate programmes and activities which foster the values of the preferred clergy leadership formation model (see Table 1.1). As such, an affirmation of a preferred clergy leadership formation model in ACSA could be supported by an analytical discussion of the kind of clergy leaders that ACSA needs. I deliberate on this issue in the next section.

### **8.2.2 Learning and clergy identity formation in ACSA**

The critical question to respond to in this section in relation to the model of clergy leadership formation which was considered relevant and preferred in ACSA in the previous section is: what does it mean to be Anglican Church clergy leaders, particularly in ACSA? Considered from the perspective of the conceptual framework used in the study, this is an inquiry that is located in the discourse revolving around the interplay between structure and agency (refer to 2.2.2.2). This is an important question to wrestle with towards an affirmation of what has emerged as the clergy leadership formation model that identifies more with ACSA.

The life blood of the study was to investigate the kind of learning that happens within and between the different clergy leadership formation activity systems which constitute ACSA (refer to Chapter Five and Six). Further, the study endeavoured to explore collaborative leadership formation practices in ACSA that could be expanded through learning (refer to Chapter Six). Ingrained in this investigation was the quest to deliberate what ought to be the identity of the person undergoing clergy leadership formation in relation to the espoused organisational stipulations (structural and cultural) of clergy leadership requirements which,

as discussed in the previous section, ought to be synchronised with contemporary and contextual needs at the local and global levels.

Seidel as cited in Pettit (2008) posited that effective clergy leadership is anchored on a solid understanding of personal identity in the personality of the person. The question “who am I?” which organisational clergy leaders are challenged to reflect on continually is emphasised (Russell, 2001; De Pree, 2004; Kouzes & Posner, 2004; Doohan, 2007; Pettit, 2008). Fundamentally, this is a quest to establish one's personal identity which, as Seidel (as cited in Pettit, 2008) contended, connects with the reality in the person's heart. Such an understanding is rooted in the persuasion that “no matter what leadership style we use, or what leadership skills we employ, our actions as leaders always come through the grid of who we are ... leadership is about the outward expression of the reality that is within the heart of the leader” (Seidel as cited in Pettit, 2008, p. 181).

Parker (1998, p. 13) concurred with Seidel (in Pettit, 2008) when he defined identity as “an evolving nexus where all the forces that constitute (my) life converge in the mystery of self ... identity is a moving intersection of the inner and outer forces that make me who I am, converging in the irreducible mystery of being human”. In organisational leadership parlance, this assertion springs from the understanding that “first and foremost, leaders lead out of who they are ... no leader sets out to be a leader per se, but rather to express (oneself) freely and fully” (Bennis, 1989, p. 5). De Pree (2004) elaborated that such type of leadership thrives on creativity rather than prescription of a checklist of what should and should not be done; it is work done in authentic relationships with fellow organisational or community members; what Archer (2003) called 1<sup>st</sup> person type of leadership (refer to 2.2.2.2.1).

Linked to the above, Seidel (as cited in Pettit, 2008) postulated that leaders with solid identity exude confidence of who they are, what they do and how they relate with other people around them. In holistic terms, they are liberated persons which manifests in the manner in which they exercise leadership: they lead; they are not driven to lead. Covey (1991, p. 23) called this “principle centred” leadership; one through which leaders exhibit inborn ability to “take off their glasses and examine the lens objectively, analysing how well their values, perceptions, beliefs, and behaviours align with *true north* principles”. In other words, such leaders value transparency and accountability which are critical attributes of clergy leadership (Badaracco & Ellsworth, 1989; Blackaby et al., 2001; Bennis, 2009). The criteria which was

used to select missionaries to other parts of the world at the time when “Global Anglicanism” was inaugurated could be drawn from to attest the model of clergy leadership implied in this discussion (refer to 4.3.3).

Seidel (as cited in Pettit, 2008) added that leaders with solid identity do not feel under pressure to project an image out there to convince all that they have something to offer. Contrastingly, a driven leader “feels a powerful sense of being compelled to gain a desired response from others in order to fill up an empty pit of internal need” (*ibid.*, p. 184). As a result of such an insatiable craving, leaders in this mould tend to be oppressive, abusive and manipulative of other organisational members (De Pree, 2004; Doohan, 2007; Pettit, 2008). Poignantly, Seidel concludes that “leaders struggling with their own identity rob those they lead of theirs!” (as cited in Pettit, p. 189). These, Archer (2003) called 3<sup>rd</sup> person driven type of leaders (refer to 2.2.2.2.1).

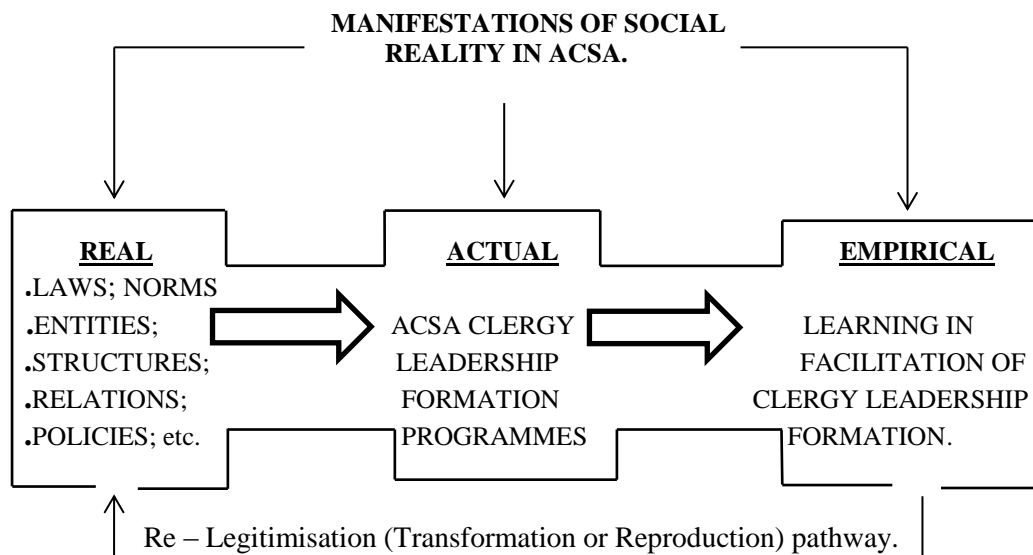
The conceptual framework used in the study emphasises a type of clergy leadership that relates with the leadership attributes emphasised in the discussion above. However, it needs to be acknowledged that, while the study locates the discourse on clergy leadership formation under the gamut of universal (meta) leadership theory, the core of clergy identity formation is understood by the Church as dependent on Jesus Christ (see Annexure 4.4). This understanding is aptly articulated in the Bishop’s *charge* during an ordination ritual for a deacon as explained in Section 8.2.1. On this understanding, it was imperative that the study acknowledged the reality of a transcendental faith and religious belief grounding to the object of study. However, this consideration did not override the empirical nature of the study on the grounds that the purpose, goals and objectives which formed the foundation of the study and the methodological and theoretical tools (conceptual framework) which guided the research processes located the study in the qualitative research paradigm as explained in Chapter Two and Three.

The next section develops what has been emphasised in this section about identity formation in relation to clergy leadership formation particularly in the context of ACSA. It has been acknowledged in this section that identity formation is critical in any endeavour to ascertain a type of leadership that synchronises with an envisioned model of clergy leadership formation in ACSA.

### 8.2.3 Reflexivity in clergy leadership formation

Critical realists postulate that human beings are endowed with a unique quality which they call reflexivity. They argue that this quality enables human beings to be creative in their practices and relationships with other human beings in any given context. Further, they contend that reflexivity enables people to be narrative beings who, in the course of time, reflect on how their understandings and perceptions about their lives and the world change, depending on what would have happened to them, thus helping them to make sense of what they are doing with their lives at any given point in their on-going lives. Archer (2003, p. 25) called this quality “internal conversation ... a kind of mental activity which because of its nature has to originate in the private domain: that is one where it is a matter of pure contingency whether it is given in public articulation or any determinate behavioural manifestation”.

Archer’s postulation observed causal powers in agency, what she called “emergent personal powers”. She based her argument on the acknowledgement that agents (people) are imbued with abilities to deliberate or reflect on their experiences (subjective reflexivity) and, as a result, make decisions to do things in certain ways, either by way of reproducing the *status quo* or transforming it (refer to 2.2).



**Figure 8.1: Depiction of a context in which clergy leadership reflexivity is exercised**

In his contribution to the discourse, Sayer (2011) averred that human beings are at the same time subjects and objects. They are subjects in so far as they are endowed with reflexive

powers and, objects, in so far as they are influenced by their contexts which are made up of natural (the created order), social (relationships with other people and other forms of the created order; structural instruments) and practical (work related) elements. On the basis of this engagement, Figure 2.13 would be adapted as in Figure 8.1.

What is emphasised in this engagement is an opinion anchored in the Vygotskian philosophical purview which argues that human beings, at any given time, are located in physical spaces bounded by time and constituted by structures (refer to 7.2.2.1, Figure 7.1) which impact their lives in different ways. Some of the structures may be supportive and empowering while others may be disempowering. Subsequently, people, who may be in leadership positions such as those of clergy in ACSA, have opportunities to exercise some reflexivity and make choices. However, the extent to which they can do so (make choices) is determined by the nature of circumstances that they find themselves in at different points in their lives (Sayer, 2011). Archer (2000, p. 11) summarised this engagement by acknowledging that “the central problem of theorising agency is how to conceptualise the human agent as someone who is both partly formed by their sociality, but also has the capacity to transform their society” (refer to Figure 2.3).

An understanding of what it means *to be* (identity) in context, particularly in relation to clergy leadership formation as understood in ACSA and discussed in this section, has fundamental connections with the task of managing educational and training programmes such as those facilitated by formators in ACSA which constitute the object of the study. What this points to about the purpose, goals and objectives of the study is that the quality of the end product of a clergy leadership formation programme in ACSA is largely determined by how the whole activity is organised and processed. This entails the need to plan and execute with diligence the necessary procedural tasks which include conceptualisation of the subject matter (content – what is going to be covered in the formation/learning programme); design (programming of the formation/learning programme which takes into account resource related issues such as finances, time, and qualified personnel); facilitation (strategies, methodologies and methods); assessment and evaluation (refer to Chapter Four; Table 5.1, 5.3, 5.4 and 6.4).

Data gathered and analysed in this study strongly suggests that successful facilitation of educational programmes such as the ACSA clergy leadership formation programme is dependent on how the above mentioned key managerial and pedagogical issues are handled.

In the next section I focus on the issues discussed above with a view to suggesting practical steps that could be followed towards conceptualising, planning, designing, facilitating, assessing and evaluating learning programmes and activities on clergy leadership formation in ACSA. The conceptual framework used in the study will guide me in the considerations, deliberations and reflections on these issues.

### **8.3 PRACTICAL APPLICATION OF THE CONCEPTUAL FRAMEWORK OF STUDY**

The heart of the educational process consists of providing aides and dialogues for translating experience into more powerful systems of notation and ordering. And it is for this reason that I think a theory of development must be linked to both a theory of knowledge and to a theory of instruction, or be doomed to triviality (Bruner, 1966, p. 21).

#### **8.3.1 Re-capturing the theoretical basis of clergy leadership formation**

The previous section emphasised what could be understood as the theoretical determinants which frame an understanding of the concept clergy leadership formation as used in the study. This section of the chapter discusses how the conceptual framework used in the study could be considered as a basis for addressing the emergent issues from the CLWs which were facilitated in the study as presented in Chapter Six. In this regard, Warmington et al. (2005) argued that an important aspect of the *telos* of expansive learning processes is to produce strong, relevant and effective conceptual resources for practitioners to use when engaging in new organisational practices and operational frameworks.

What is suggested here is that expansive learning processes should not be ends in themselves but should be intentional in advancing organisational needs and aspirations through equipping practitioners (participants) with the requisite knowledge which is intended to translate into practical skills demanded by changes in organisational structural requirements and routine activities. This is where the understanding of Vygotsky's theory of human consciousness development, emphasising an intersection of "everyday concepts" with "scientific concepts" (1978) comes in (Scribner, 1997 as cited in Yamagata-Lynch, 2010, p. 15; see Figure 7.2).

What the above means is that conceptual tools learnt through expansive learning processes ought to assist practitioners (participants) with improving (remediate) their agential responsibilities in the context of their work places, hence the Vygotskian term “cultural interpretation”. It *should* all make practical sense in context. In this way, cognition is applied on practice in contextual work places, thus capturing the notion associated with Vygotskian theorisation of “organism” (human being) and “environment” (social context; social world) as “disembodied entities” (*ibid.*).

Linked to the above, Engeström and Sannino (2012) postulated that:

Concept formation has traditionally been seen as a process in which individual learners acquire well-defined scientific concepts determined by the curriculum. However, in the work practices of today’s organizations and professions, concept formation is increasingly a challenge of making collective sense of ill-defined phenomena. Concept formation is therefore becoming an open-ended creative endeavour characterized by uncertainty, debate, and grounding in material objects, artefacts, and bodies. We may call it concept formation in the wild or as Greeno (2012) suggests, formation of functional concepts (p. 36).

CLWs which were facilitated in the study (refer to Chapter Six) resulted in participants modelling solutions in response to contradictions experienced in clergy leadership formation programmes and activities in ACSA which had been surfaced. The modelled solutions, in each case study, revolved around concepts which articulate particular aspects of the object of study. In the ACSA ministry and training case study the modelled solution revolved around the concept of clergy leadership at two levels: (i) understandings of what clergy leadership entails, (ii) duties of a bishop. In the Cott case study the modelled solution revolved around the concept of curriculum in terms of conceptualisation, design, facilitation, assessment and evaluation.

Taking a cue from what has been emphasised above about the need for practitioners (participants) to implement learnt conceptual tools in contextual work places and the assertion by Hall and Greeno (2008, p. 213) that “because they are considered useful in framing organisational activities, institution related concepts and their meanings either develop and evolve (transformed) or remain the same (reproduced) with the passage of time”, the Vygotskian grounded conceptual framework used in the study could be implemented practically in response to the CLW emergent issues across the two case studies.

Drawing from research data, two inter-related parts would constitute the practical considerations for a formation (learning) programme in the context of ACSA. The first part would focus on the foundational considerations which ought to be done in processes that lead to designing and facilitating educational programmes and activities such as those relating to clergy leadership formation in ACSA. In other words, this is the task of conceptualising the subject matter of the learning programme (curriculum as used in 6.4).

In line with Chapter Four of the study, particularly Section 4.2, this task would focus on Christian identity formation which would lay the foundation for Christian character formation. As discussed in Section 8.2.2, Christian identity formation ought to be a critical consideration for the responsibility of clergy leadership vis-à-vis the structural stipulations of the organisation (ACSA) as articulated in the *charge* that a presiding Bishop reads out on the occasion of the ordination of a deacon (refer to 8.2.2). This consideration emphasises that Christian character/identity formation is the bedrock of clergy leadership formation in ACSA. What this says, unambiguously, is that one would not qualify for clergy leadership formation if one did not have a solid Christian formation foundation. This contextualises some of the participant concerns which were shared during the exploratory phase of the research as below:

<p><i>We keep restating our desire for spiritual and moral formation, but we continue to be bedevilled by the status seeking “prince priest” model rather than emphasising contextually rooted models of clergy formation. Perhaps we need to design and frame our programmes more in the model of Theological Education by Extension. [Aint2] (Table 5.1)</i></p>
--

<p><i>We need people formed as Christians first and Anglicans afterwards. We seem to miss the need for moral framework around priestly life and expectations – including integrity, self-giving, avoidance of theft and abuse of people, etc. [Aint7] (Table 5.1)</i></p>
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The second part of the considerations would focus on streamlining what would constitute clergy leadership formation programmes and activities in ACSA. As stated, the second part of the deliberations is specialised in the sense that it focuses on a particular formation (learning) programme for a particular group of Christians in ACSA.

Chapter Four, therefore, provided a basis for a deepened engagement of the object of study in terms of conceptualisation, design, facilitation, assessment and evaluation. Summarised, the

two distinct but inter-related domains which undergird the whole process of clergy leadership formation are modelled in Chapter Four as follows:

(i) Christian identity formation – understood as the basis for clergy leadership formation models (refer to 4.2; Figure 4.1).

(ii) Clergy leadership formation models (refer to 4.3 and 4.4; Figure 4.2 and 4.3). In the context of ACSA, this domain would fall under the category of “seminary model” which is discussed particularly in Section 4.2.5 (Anglican Communion) and 4.4.3 (ACSA) (refer to Figure 4.2 and 4.3 as well).

The following sections critically engage these domains with the objective of initiating a discourse which could provide a basis for practical implementation of the ideas discussed in real clergy leadership formation programmes in ACSA.

### **8.3.2 Modelling the basis for clergy leadership formation in ACSA**

A practical application of the carved understanding of the concept clergy leadership formation as a projection of the conceptual framework used in the study would require engagement of pedagogical issues that are critical to guiding effective planning and management of clergy leadership formation programmes in ACSA. In Section 4.2.1 the term “catechetical”, which is derived from catechesis (κατηχέω in Greek), was explained as the basis of the teaching of the church from the New Testament period (Westerhoff, 1981) which, when the practice ceased to function, the teaching function of the church fell apart and heresy crept into the church (refer to 4.2.1.1). Important as it is presented in the history of the church, I use this concept in this section of the chapter to broaden and deepen the discourse on Christian identity formation which has been highlighted as the foundation for clergy leadership formation programmes and activities in the church, ACSA in particular.

Westerhoff and Edwards as cited in Nelson (1999) defined catechesis as “the process by which persons are initiated into the Christian community and its faith, revelation and vocation” (p. 185), thus emphasising the understanding that considers catechesis as the foundational teaching methodology in the church for all age groups, depending on needs for individuals or specific groups in the church and community at large. This pedagogical emphasis is exemplified in the New Testament section of the Bible where we read and learn that the Apostles’ teachings were grounded in the gospel message which had been taught and

demonstrated in the most profound practical ways by Jesus during his earthly ministry (Groome, 1980; Reed & Prevost, 1993; Tye, 2000; Nelson, 1999; Elias, 2002).

It can be argued that Jesus, through his teaching ministry (with a focus on cognitive and spiritual development), also created an enabling environment for his audience to grow in leadership skills. As a result, his disciples assumed leadership responsibilities after he had died. They did not need to be physically involved in his ministry every day, but just by being in his company, listening to him and observing what he did, they had ample opportunity to develop as future Christian leaders (Malphurs, 2003; Bennis, 2009). This reinforces the socio-cultural historical emphasis of the importance of the environment in which learning is facilitated; it can either enable or constrain development (Vygotsky, 1978).



***Figure 8.2: Illustration of a catechetical session in context***

Figure 8.2 is an illustration of a catechetical session that is facilitated in context. Based on the understanding explained in Section 4.2 about the considerations that a facilitator of learning or teacher would need to do when selecting relevant methodologies, methods and resources to use in a given teaching and learning encounter on a particular topic, natural objects such as flowers could be used as teaching aids in the context of the teaching and learning interaction illustrated. This observation relates to the importance of context in teaching and learning programmes in the church, ACSA in particular. Chapter Four emphasised this observation

throughout the different phases of the history of clergy leadership formation in the Anglican Church, ACSA in particular (refer to Figure 4.1, 4.2, 4.3). Using the Vygotskian (1978) perspective on human consciousness development, this observation affirms the assertion that context creates content and methodologies for teaching and learning interactions.

### ***8.3.2.1 Affirming participation in clergy leadership formation***

The question to respond to in this section as part of the broader discourse is: who qualifies to be considered for the responsibility of clergy leadership in ACSA? Tye (2000) suggested that all faithful members of the church are potentially equipped Christian leaders. This is an understanding which relates to Christian identity formation issues as discussed earlier in the chapter (refer to 8.2.2).

Broadening the discourse, Groome (1991) in concurrence with Pettit (2008) are of the opinion that at the centre of the theoretical and methodological deliberations about clergy leadership formation is a prioritisation of community life, implying belongingness and identity orientation. Fundamental to this opinion and in agreement with the explanation presented in Section 1.2.2 is an acknowledgement of the understanding that formation towards Christian maturity is an encompassing<sup>97</sup> and on-going process whose facilitation requires intentional planning and management (Chow, 1981; Amirtham & Pryor, 1989; Johnson & Johnson, 1989; Griffiths, 1990; Lamoureux, 1999; Smith, 1999; Pettit, 2008; Naidoo, 2011).

Therefore, because of the nature of the teaching and learning which is facilitated through catechism as explained above, all faithful members of the church, at their different levels of faith development, ought to identify with the calling or vocation of the church (Harris, 1989).

### ***8.3.2.2 Affirming the vocation of the church in relation clergy leadership formation***

Roberto (2006) averred that the whole life and work of the church should be considered as Christian formation curriculum, thus emphasising that catechesis is an encompassing transformational learning experience. Harris (1989) complemented Roberto's opinion by

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<sup>97</sup>This opinion is in observation of the claim that "If religious education is to avoid the pitfalls of fossilization and an uncritical pursuit of relevance, then it must conserve and change, continue ancient symbols and explore new possibilities, hand on tradition and transform the world. Traditions, like roots, are lifelines to vital sources from which new entities develop. Transformation exists to make transformation possible" (Boys, 1979, p. 14).

suggesting what she called the “vocation of the church” (what the church *actually* does) which she subdivided into five forms of curriculum, namely:

i) Koinonia – the curriculum of Community; learning through engagements with communities across the events and activities which preoccupy people. The goal of this form of curriculum is to foster loving communities.

ii) Leiturgia – the curriculum of Prayer; learning through participation in prayer at individual (private) or corporate levels in different situations and places as may be determined by life events and circumstances.

iii) Didache – the curriculum of Teaching; experiencing learning through contexts of formal teaching and learning such as Sunday school or theological education in a seminary such as Cott.

iv) Kerygma – the curriculum of Proclamation (Preaching) – learning through listening to interpretations of the Word of God. In the case of individuals involved in clergy leadership formation, this may entail learning from “hands on” experience, meaning learning from own preaching. This often entails receiving feedback from those who would have listened to the preaching.

v) Diakonia – the curriculum of Service; learning through “hands on” involvement in acts of caring and service to communities with a particular concern for those in situations of difficulty or marginalisation of any kind.

In view of the above, Marthaler (1978, p. 88) postulated that the catechetical model of teaching is premised on three goals which have preoccupied the church from New Testament times which are:

i) the broadening of a Christian member’s horizons in terms of growth in personal faith;

ii) the gradual incorporation of members into a society of believers;

iii) the maintenance and transmission of a particular symbol system that communicates and expresses Christian identity in the first instance and, secondarily, denominational identity.

Marthaler's postulation emphasised the complex interconnectedness of three things in the life and work of the Church, particularly where it pertains to Christian formation, which are: the needs of the individual Christian member; the values and norms of the Christian faith; and the Christian community resultant of the coming together of individual believers, generally referred to as the church, at the different levels of its life and work. The core of this line of thought is the affirmation that the catechetical model foregrounds Christian formation on identity orientation and holistic development of believers through rigorous teaching of the values and norms of the faith tradition(s) in a community context (Groome, 1980; Harris, 1989; Nelson, 1999; Roberto, 2006; Pettit, 2008; refer to 7.2.2.1; Figure 7.1).

Further, Marthaler asserted that the catechetical model of Christian formation emphasises that "catechesis, in the final analysis, is community education; ... the community of faith with all its formal and informal structures is the chief catechist" (1978; p. 89). Therefore, catechesis could be understood as "a process of becoming Christian" through socially mediated activities aimed at producing self-identity in the learner and enhancement of continuing growth in the facilitator of the learning programme (Groome, 1980, p. 110; refer to 7.2.2.2). However, the critical realist approach which constitutes the conceptual framework used in the study problematises the notion behind a community orientated understanding of Christian identity formation as discussed in the next section.

### ***8.3.2.3 Personal contribution in own Christian identity formation***

Groome, having been influenced by critical theorists such as Karl Marx, applied what he called "critical reflection" (1991, p. 409) to interrogate the scholarly posture suggested in the literature on Christian identity formation as discussed in the previous section. He argued that:

If our self-identity was totally determined by the socialisation process, then change would be well-nigh impossible and significant differences would be unlikely, at least among people who achieve self-identity within the same social/cultural environment. But change takes place. People are different. ... the self is shaped but not determined by society and culture. Instead, the interaction between the self and society is dialectical, the person holding out, at least to some extent, for his or her individual identity. (1980, p. 113; refer to 7.2.2.1)

Groome questioned the role played by individual participants in their formation towards maturity in the Christian faith. Ingrained in the enquiry is the critical theorist opinion that acknowledges the fullness of humanity in individual beings, which implies the potential to

think for themselves and make sound decisions in what they do in and with their lives (Groome, 1980; Groome, 1991; Archer, 2003). This consideration in the discourse relates with what was discussed in Section 8.2.2 and 8.2.3.

Groome's critical enquiry resonated with a new perspective/paradigm that had emerged in the field of Christian Education in the early 1980s which interrogated the whole purpose of church-based educational programmes, particularly noting that such programmes were designed and exclusively facilitated in the model of classroom instruction (Marthaler, 1978; Harris, 1989; Miller, 1993; Nelson, 1999; Westerhoff, 2000; Roberto, 2006). The critical question raised was whether such approaches to Christian formation were still relevant *vis-à-vis* the many developments happening in the world across all facets of life? For instance, whereas it was acknowledged that the Sunday school phenomenon<sup>98</sup> had been started in response to a particular problem, it needed to be critically considered whether the manner in which it continues to be planned and facilitated is still relevant in the life and work of the church across diverse global contexts (Nelson, 1999; Roberto, 2006).

Groome (1991) took a step further in interrogating the community orientated notion of Christian identity formation by surfacing a “double bind” (Engeström, 1999; refer to Figure 7.2) in the understanding, in the following way:

### **STIMULUS 1**

(a) **Notion stated in practical terms:** A community orientated notion of Christian identity formation implies that the Christian faith is introduced to individuals who belong to particular communities with unique socio-cultural backgrounds, identities and histories. Therefore, introducing the Christian faith to members of a particular community entails *embracing the community as a whole* (Nelson, 1999; Westerhoff, 2000; Roberto, 2006).

(b) **Contradiction:** Such an orientation would imply taking on board *everything* that a community is. The question to ask, therefore, is: how would the church deal with what she

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<sup>98</sup>“The Sunday school movement was started in 1780 in Gloucester, England, by Robert Raikes, a printer and newspaper publisher. Established for poor children in Sooty Alley near the city jail, it was called a Sunday school because it met all day on Sunday. Its aim was to help educate socially disadvantaged children, many of who worked six days a week in the nearby pin factory” (Nelson, 1989, p. 186).

considers unacceptable (unpalatable to the doctrine of the church) in this scenario without compromising her integrity and purpose in the community in question and the world at large?

## **STIMULUS 2**

**Mediation strategy:** John Westerhoff (2000) was of the opinion that the word *formation* is of paramount importance in an effort to understand the purpose of catechism or the teaching of the Church. He argued that:

*Formation* is an intentional process by which culture, a people's understandings and ways of life, their world view (perceptions of reality), and their ethos (values and ways of life) are transmitted from one generation to another. It is a process of transformation and formation, of conversion and nurture. (pp. 39-40)

An illustration to contextualise Westerhoff's opinion could be drawn from what was shared by research participants in the exploratory phase of the study relating to some of their pastoral experiences. They disclosed that it was a lived experience that the majority of African Christians (black people) subscribe to both Christianity and African Traditional Religion(s). This has resulted in the observance of two forms of worship in communities where such beliefs are held: *day light* worship (Christianity) and *night vigils* (African traditional religious activities). In such contexts, clergy were involved in a battle with the challenge of ministering to two types of believers: the *fence percher* – one who is an undecided follower straddling between Christianity and African Traditional Religion(s); and the *faithful follower* – one who has made an unambiguous decision to be a Christian or adherent of the African Traditional Religion.

The critical question that arises in consideration of contexts as described above is how a clergy person (agent in Christian identity formation) is expected to manage the challenges which come with diverse understandings of religious affiliation? Different clergy have responded to the challenge in different ways which have yielded different results; some transformative, others disastrous. As explained above, Westerhoff (2000) suggested using the concept *formation* as a mediational tool when confronted with such dilemmas in the area of Christian identity formation.

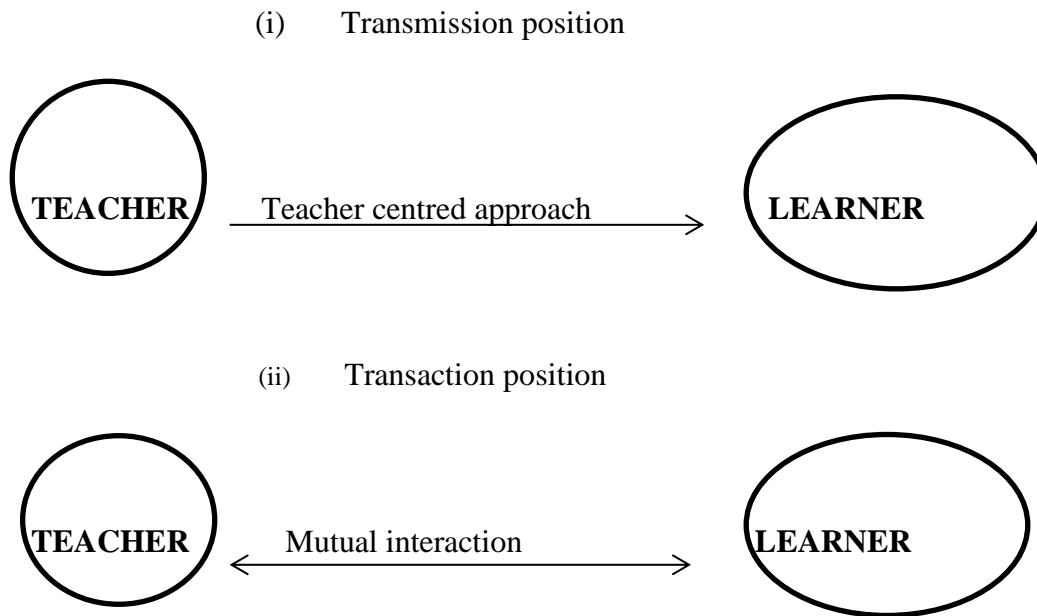
These considerations have direct implications on individual Christian identity formation in the first instance, and the collective Christian body in the second instance.

#### ***8.3.2.4 Reconceptualising the catechetical model of Christian identity formation***

The discourse on the catechetical model of Christian identity formation in the previous sections has insinuated two paradigms which, for purposes of the study would need to be reconceptualised so as to foster a relevant understanding of catechesis in the context of ACSA, particularly in relation to the facilitation of clergy leadership formation programmes and activities.

On one hand is accommodated a catechetical paradigm that could be labelled “mechanical” when considered from a teaching and learning methodological point of view as the learner does very little with the MKO (teacher) doing almost everything in the teaching and learning activities. This paradigm of catechesis would qualify as indoctrination (refer to Table 6.5). On the other hand is a paradigm that argues for enhanced interaction between the different groups of people involved in the educational activities; thus, affirming the *being-ness* and *belongingness* of the participants (Groome, 1980; Groome, 1991; Nelson, 1999). The different levels of such an interaction could be between learners among themselves; learners and those mandated with the responsibility to facilitate educational programmes on behalf of the Church (teachers); the learners and teachers as members of the broader community beyond the boundaries of the Church.

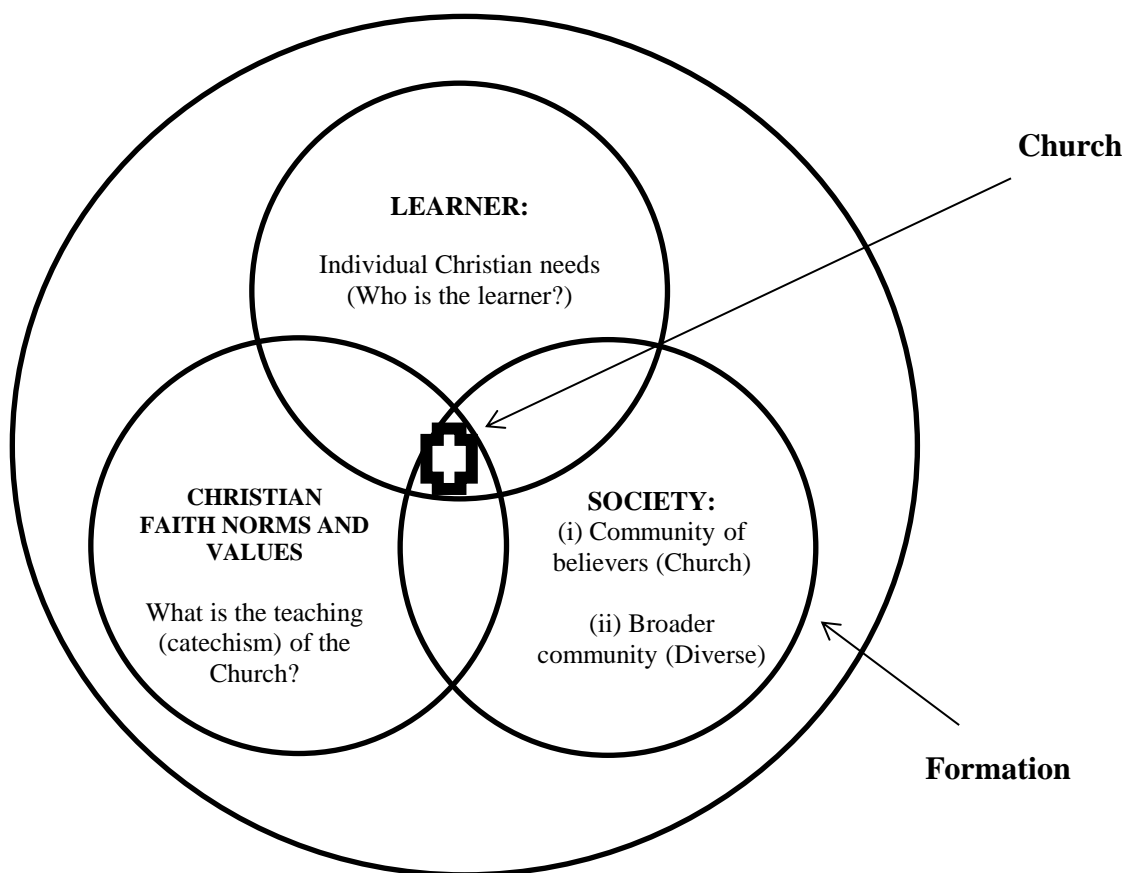
Drawing on Dewey’s “conception of enquiry and scientific method” in curricula deliberations in the 1960s, Miller (1993) used a different terminology to refer to the second paradigm distinguished above, what he called *transaction position*, which is opposed to the first paradigm which he called *transmission position*. Miller asserted that the first paradigm argued for an understanding of the learner as “rational and capable of intelligent behaviour; a problem solver” (p. 59). Below is an adapted diagrammatic presentation of Miller’s suggestion:



*Figure 8.3: Diagrammatic illustration of Miller’s theory*

However, Miller conceded that the “transaction position” paradigm was itself far from realisation of a “transformed position” as it lacked “imagination, intuition, and most importantly a sense of the sacred” (p. 59). In agreement with Miller, Westerhoff (2000, pp. 139-140) elaborated that an ideal catechetical environment should cater for “three intentional, interrelated, lifelong processes: instruction (acquiring knowledge and skills), education (critical reflection on experience, tradition, Scripture, reasoning) and formation”. This perspective was in line with Westerhoff’s (2000) explanation of what he understood the term “formation” to imply as explained in the previous section. Suffice to say, the Church expresses her “formation agenda” through what, where, how and why she teaches (Harris, 1989; Tye, 2000, Estep, Jr. in Estep, Jr. et al., 2008; see Figure 8.4). It can therefore be concluded that “formation” is the totality of the work of the Church, what Harris (1989) calls “educational vocation” (p. 38).

In the form of a diagram, the different aspects of the catechetical model of Christian identity formation which have been discussed so far in the chapter can be summarised as in Figure 8.4.



*Figure 8.4: Illustration of a triple-fold framework of Christian leadership formation from the perspective of the catechetical model of Christian identity and character formation*

Three sets of questions arise in an attempted practical implementation of the reconceptualised understanding of the catechetical model of Christian identity and character formation:

*Table 8.2: Details of the framework of a reconceptualised catechetical model in the form of questions*

FOCUS OF QUESTION	QUESTION DETAILS
Learner identity	Who is the learner/recipient of the catechetical programme?
i) Context of the catechetical programme ii) Methodological considerations	Where is the learner located (context)? What are the relevant pedagogical methods and resources which could be used in the facilitation of the teaching and learning?
i) Content of the catechetical programme ii) Teacher or facilitator of the catechetical programme	What is the content of the catechetical programme? Who would be the appropriate teacher or facilitator of the teaching and learning?

In the next section, I turn to discuss the second domain of Christian identity and character formation which is the object of this study: clergy leadership formation.

### 8.3.3 Conceptualisation of a clergy leadership formation model relevant for ACSA

Clergy leadership formation in the context of ACSA was introduced in Section 1.2 as a three-legged concept comprising theological education (cognitive), spiritual formation (nurturing of spirituality), and ministerial formation (practical skills) (Lindbeck as cited in Astley et al., 1996). The metaphor “three legged” implies that the three elements constituting the concept are integrated, thus requiring a holistic approach to the facilitation of the learning programmes and activities (*ibid*). Banks (1999) suggested three words to articulate what is happening in each of the three legs of the concept (in relation to the other two legs) as follows:

(i) **Theological education** (cognitive) – knowing (know). The focus in this sphere of the clergy leadership formation programmes and activities is knowledge. As explained in Section 1.2, individuals in formation for ordained ministries (clergy leadership), would be required to meet a set theological education academic requirement before they can be considered for ordination. Figure 5.2 states that the outcome of the object of the Cott formation activity system is: “theologically informed, critical, ethical, and morally conscious clergy for the church and the world”. In concurrence with this commitment, Groome (1991, p. 8) reflected that “the incarnational principle that stands at the heart of Christianity demands a pedagogy that is grounded in and shapes people’s ontic selves – their identity and agency in the world”. Therein enshrined is the object of the concept clergy leadership formation in ACSA and, by association, the role of formators in facilitating the programmes and activities which constitute the former.

(ii) **Spiritual formation** – being (be). This is the sphere of spirituality in clergy leadership formation programmes and activities. Individuals in formation for ordained ministries are required to cultivate a way of living that is consonant with Christian teachings. MacGrath (1999, p. 124) added to this expectation by asserting that spirituality fostering is “the *quest* for a *fulfilled* and *authentic* life, that involves taking the beliefs and values of Christianity and weaving them into the fabric of our lives so that they *animate*, provide the *breath* and *spirit* and *fire* for our lives”. In accordance, during their time in formation, individuals called to the ordained ministries are exposed to different spiritual disciplines such as those discussed in Section 4.3 and would be guided by formators (MKOs) to identify with

selected ones, each individual according to their spiritual inclinations. Figure 6.1 and 6.2 give testimony of how spiritual disciplines have the potential to develop, nurture and influence life orientations in individuals to an extent that whatever they do in their lives, it is deliberated from the perspective of the spiritual discipline(s) in question (refer to 8.2.2 and 8.2.3). Groome (1991, p. 89), in concurrence with McGrath (1999) emphasised that “remembering, reasoning, and imagining are constitutive of our *being* as agent-subjects in the world” which aligns with the critical realist transformatory perspective whose foundation is in the conceptual framework used in the study.

**(iii) Ministerial formation** – doing (do). This is the sphere of praxis in clergy leadership formation which affirms individual spiritual orientations and the extent to which they would have learned and understood theological doctrines covered throughout their duration in formation (Banks, 1999; Mwangi & de Klerk, 2011). As with the spiritual formation domain as explained above, individuals in formation are afforded opportunities to implement in real life settings the theological education knowledge that they would have accrued and reflected upon from the perspective of the different spiritual disciplines that they would have been exposed to during their time in formation (Moyo as cited in Pobee & Kudadgie, 1990; refer to Annexures 6.3; 6.5 and 6.6). Praxis in clergy leadership formation programmes and activities cultivates agency in individual learners/participants, a notion which is aptly captured by Groome (1991, p. 135) when he averred that “praxis is a participative and dialogical pedagogy in which people reflect critically on their own historical agency in time and place and on their sociocultural reality”.

What is emphasised in the domains of clergy leadership formation discussed above is that whatever individuals involved (whether still in formation or already in ordained ministry) do or not do, should be guided by the teachings of the church and the spiritual disciplines which have nurtured and nourished the Christian faith over the many generations of faithful adherence, particularly looked at from the perspective of the responsibility of clergy leadership in the work and life of the church. It is evidenced in the explanations of the three spheres above that they are interconnected and feed into each other which is the basis for a recommendation to the church, ACSA in particular, to prioritise and support the seminary model of clergy leadership formation (refer to Chapter Nine).

### ***8.3.3.1 Design of a clergy leadership formation model suitable for ACSA***

The seminary model of clergy leadership formation, despite its appealing format (see Figure 8.6) in relation to the object of the practice as discussed in the previous section, has received negative criticism in the history of the church, the Anglican Church in particular (refer to 4.2.5; Table 4.2, 6.3 and 6.4). For instance, whereas it would be hoped that upon completion of the theological education, spiritual and ministerial formation programme in the duration recommended for each individual, the students would have been equipped with the requisite knowledge, skills and values for application in real ministerial contexts, data from literature (refer to 4.2.5), research done in the exploratory phase of the study (mirror data) and CLWs (refer to Table 5.1, 5.2, 6.1 and 6.2) inform lack of collaborative work practices between the seminary and the church. Such practices, if they had been in place, would have been helpful in informing the seminary of the impact their “products” were making in the community and, in response, the seminary would have done the required reviews and evaluation of programmes offered in order to align or connect with contextual needs as would have been advised by the church.

Other problems with the seminary model are that “the model projects the educator primarily as a lecturer, who necessarily becomes the role model for the aspiring minister (clergy person). Consequently, the student enters the ministry seeing the task as primarily an intellectual one ... (also) seminaries have often adopted secular models of education, rather than subject them to rigorous theological or practical evaluation” (Mwagi & de Klerk, 2011, p. 2). This speaks to the issue of imbalance in the manner that the clergy leadership formation programme and practices would have been conceptualised, designed, facilitated and managed. The three spheres associated with clergy leadership formation that I discussed in the previous section (*know, be* and *do*) would have been misaligned in this case.

The lack of collaborative practices between dioceses and the seminary (Cott) and imbalance in the conceptualisation, design, facilitation and management of clergy leadership programmes and activities have emerged in the study as critical issues, among others, that ACSA is challenged to respond to if the Vision and Mission statement of the organisation are to be actualised. It is in connection with these organisational concerns that this study had an interest in suggesting collaborative initiatives that could be implemented by the activity systems which are involved in the facilitation of clergy leadership formation in ACSA. I

discuss more pointedly in Chapter Nine as recommendations, how the issues emerging as contradictions in the study could be resolved towards collaborative and transforming practices in clergy leadership formation in ACSA.

Using the details given above, a diagrammatic representation of the three spheres constituting the facilitation of clergy leadership formation in ACSA could be presented as follows:



**Figure 8.5: Illustration of the integration of the three spheres of clergy leadership formation in ACSA**

Basing on the research findings in the study, Figure 8.6 is an illustration of a transformed model that would articulate the manner in which clergy leadership formation programmes and practices in ACSA ought to be conceptualised, designed and facilitated for the reasons that I give below. The illustration is based on a diagram which was initially used by Banks (1999) to describe a traditional theological education and training model and, later, was adapted by Mwangi and de Klerk (2011) in their article.

Firstly, in accordance with the historical trajectory mapped out in the study about clergy leadership formation and the nature of denomination that the Anglican Church is as detailed in Section 4.3 and 4.4, the broken lines framing the three spheres (*know*, *do*, and *be*) are representative of the flexibility, open-mindedness, diversity of opinion, and creativity with which clergy leadership formation programmes and activities ought to be conceptualised, designed, facilitated and managed in ACSA. This would actualise the Anglican Church’s commitment to observe and utilise the “*Via Media*” or “*principle of indifference*” methodology in her work, within and without the organisation (Chatfield, 1998, p. 20) (refer to 4.3.2). As such, individual preferences such as those of formators at Cott discussed in Section 6.4 would be accommodated for as long as they added value to the object of the

organisation. Regarding perspectives about clergy leadership and duties of a bishop in the Anglican Church, ACSA in particular (refer to 6.3), diverse understandings would be brought under scrutiny using selected analytical tools which would include conceptual tools drawn from the history of Anglican Church such as those which define the different spiritualities which emerge in the life and work of the Anglican Church. The objective would be to interrogate those perspectives with a view to contextualising them for guidance and affirmation (refer to 4.3.2.1).

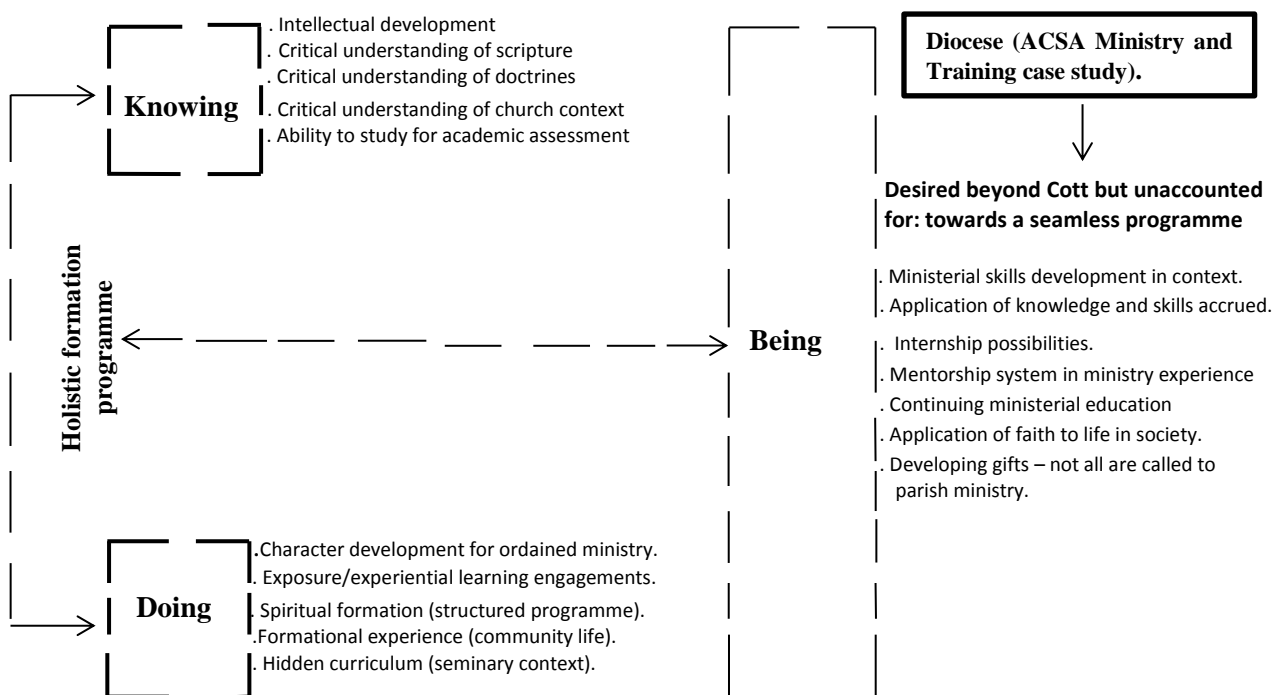
Unlike the solid framework illustrated in Figure 8.5, the “brokenness” of the framework in Figure 8.6 projects the critical realist argument that underlies the conceptual framework used in the study that emphasises that there are different ways of understanding phenomena (three forms of reality) (Bhaskar, 1998), a perspective which coheres with the intended outcomes for all the activity systems involved in the study which point to transformed, transforming, transformational, liberating practices in clergy leadership formation in context, thus underscoring the “embodiedness” and “incarnatedness” of the envisioned leadership of the clergy who would be products of the programmes and activities under discussion (refer to 8.2.1).

Observance of the understanding articulated above would create a teaching and learning (formation) environment in ACSA that is transforming, transformational, transformative and liberating; characterised by values such as fairness, justice, freedom, unity, love and tolerance. Such an environment would be foundational for continual expansive learning processes and activities on clergy leadership formation in the organisation. Additionally, it would augur well with the notion of ACSA as *family* (refer to 6.3.3.3).

Secondly, the transformed model (Figure 8.6) is intentional in linking the seminary with the diocese towards a seamless clergy leadership formation programme. This would cater for the concerns which were discussed earlier on about the lack of collaborative practices between the diocese and the seminary. Simultaneously, the challenge of an imbalanced clergy leadership formation programme would also be resolved to a significant extent as the fostered collaborative working environment would streamline where focus would need to be placed in both the seminary and the diocese contexts. In other words, the transforming working environment would be conducive for the organisation to work towards resolving issues which

come about as a result of lack of collaborative practices between the two organisational entities which may include concerns encapsulated in the following questions<sup>99</sup>:

- (i) What does the student already know before being enrolled in a seminary?
- (ii) How much work experience does the student have?
- (iii) What might be the “specialised” vocation of the student?
- (iv) What might be the area(s) of weakness of the student for which the student might need additional help?
- (v) How might the student’s seminary experience be enhanced through participation in diocesan programmes and activities?
- (vi) Does the student have a mentor?



**Figure 8.6: Modelling clergy leadership formation programmes and practices in ACSA**

<sup>99</sup>The student admission form at Cott requires applicants and their sponsors to provide information to the College on most of the questions listed here. However, data gathered through document analysis revealed that “paper work” and “practice” did not always correlate. Some critical issues about individual students went unnoticed which stands out as a contradiction in management processes at the College.

## 8.4 CONCLUSION

The analytical discussion of the chapter was divided into two. The first part engaged emerging models of clergy leadership formation in ACSA, drawing from *mirror data* and the outcomes of the CLWs which were facilitated in the study. The engagement was aimed at establishing a model or models of clergy leadership formation for ACSA which could be described as transforming, transformative, transformational, liberating, embodied, contextual or incarnated. It was envisioned that the established model would be the basis for future expansive learning processes in ACSA in response to contradictions which may be revealed in continuing programmes and activities in clergy leadership formation, “ill-defined phenomena” (Engeström, 1987).

The second part of the chapter focused on modelling practical programmes and activities in clergy leadership formation, streamlining the two key aspects of the process as informed by the events and developments which have happened in the church from New Testament times, through the Reformation period and subsequently, in ACSA. The two streamlined key areas of clergy leadership formation were discussed as Christian identity and character formation, revolving around the concept “catechesis”; and formation of clergy through the seminary model. I emphasised that the streamlined two key areas were complementary; it is inconceivable to imagine someone who did not experience the foundational phase of Christian identity and character formation to be considered for clergy leadership formation whose product would be a priest in and for the church and the world.

I give recommendations in response to research findings and conclude the study in the next chapter.

## CHAPTER NINE: RESEARCH FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

What has been is what will be, and what has been done is what will be done; there is nothing new under the sun. Is there a thing of which it is said, ‘see, this is new’?” (*Ecclesiastes 1: 9-10a*).

### 9.1 INTRODUCTION

In this chapter I summarise research findings in response to the research questions set for the study. I then present concluding reflections and give recommendations for the study on the basis of the research findings. In order to ensure that the critical aspects of the study have been integrated, the conclusions drawn and recommendations made are done within the theoretical and conceptual frameworks used in the study.

### 9.2 KEY FINDINGS OF THE STUDY

The study was done in two phases, namely exploratory and expansive learning phases. The exploratory phase provided *mirror data* for the expansive learning phase as explained in Section 3.3.2.1. The expansive learning phase was facilitated through CLWs which involved the two case studies used in the study (refer to 3.3.2.2 and 3.4.4).

I collected data from participants in activity systems which are involved in clergy leadership formation programmes and activities in ACSA using selected data collection methods (refer to Chapter Three). The data collection processes and activities were in response to the research questions set for the study (refer to 1.5).

In the next sections, I discuss key findings drawn from the study which respond to the set research questions.

#### 9.2.1 Finding 1

**Responding to the research question:** *What learning in facilitation of clergy leadership formation takes place among different participant groups in ACSA?*

The study has shown that *learning* is the life-blood of clergy leadership formation programmes and activities in ACSA. In all the interactions which were done with research

participants and observations made during the entire research process, it came out strongly that ACSA, at all levels of operation, leadership and management observes and values, in multiple ways, the need to educate, train and prepare for effective church leadership those who have offered themselves for ordained ministry. In observance of this organisational positioning regarding the subject (*clergy leadership formation*), ACSA has structures (*activity systems*) that create learning opportunities for both facilitators (*formators*) and recipients of the learning and training programmes (*ordinands*). For purposes of this study which explores expansive learning possibilities for clergy leadership formators, Cott, ABoTE, TfM and Hope Africa activity systems were selected as sources of data (refer to 1.2.3).

The three domains (*cognitive; ministerial; and spiritual*) which framed the discussions of the object of the study, *facilitation of clergy leadership formation* (see 1.2.2.1 and 8.3.3), are helpful in an effort to decipher the kind of learning that was experienced by participants (*formators*) in the study. Such an exercise takes cognisance of the understanding that these three domains are integrated which implies the non-existence or superficiality of boundaries between them (Lindbeck as cited in Astley et al., 1996; refer to Figure 8.6). For purposes of clarity, I use the streamlined domains separately to present the findings which respond to the first research question set for the study.

#### **9.2.1.1 Cognitive domain (know - knowledge)**

Our minds are formed by the ways of thinking and concepts in use that are available to us in our social worlds. (Edwards, 2007, p. 3)

The study has shown that knowledge of the object of the study, *facilitation of clergy leadership formation*, is a key learning focus in ACSA clergy leadership formation programmes and activities. Participants disagreed in their understandings of what was entailed by the concept, which resulted in robust engagements in the research processes, particularly during focus group discussions and CLWs (Chapter Five and Six). The three parts of the object of study, namely *facilitation, clergy leadership* and *formation* received equal attention in the contested deliberations which characterised the research processes and activities mainly with the ACSA Ministry and Training participants.

Facilitation: Interactions with research participants revealed an unsystematic understanding of the entailments of the term *facilitation* in teaching and learning programmes and processes, *clergy leadership formation practices* in the case of this study. In a conventional sense,

*facilitation* of a teaching and learning programme entails processes and procedures which include conceptualisation, planning, design, assessment and evaluation of the teaching and learning programme (refer to 6.3.6; Table 6.6). In contrast, the study revealed that *facilitation* of clergy leadership formation in ACSA was almost exclusively understood as instruction, implying delivery of subject matter. As a result, deficiencies were evidenced in programme conceptualisation, design, organisation and management (refer to 6.2 and 6.3).

Clergy leadership: In both phases of the research process across the activity systems used in the study, but mostly in relation to those which constituted the ACSA Ministry and Training case study (see Figure 3.1), it was observed that in the initial stages of research interactions with the researcher or with other participants, individual participants expressed an understanding of *clergy leadership* more as a *function or responsibility* and less as an *objective concept*, *sui generis*. Such a perception implied that if one grasped the *practice* of clergy leadership, it would imply *cognitive development* of what the concept entailed. Thus, the concern about *who should be a leader* in ordained ministry and not *what leadership in ordained ministry entails* preoccupied the deliberations and reflections of the participants during the research processes. In Foucauldian conceptualisation of power, the participants in this instance of the study were interrogating the “genealogy” (Foucault, 1988) of understandings of clergy leadership in ACSA with the objective of transforming such understandings.

Formation: The research processes and activities revealed that participants’ diverse understandings of the term *facilitation* were in pursuance of what could be considered a relevant and effective *clergy leadership formation* strategy, approach or methodology in ACSA. As a result, despite the existence of structures in ACSA which inform, guide and promote a formally constituted strategy on the object of study like ABoTE, it was observed that research participants, mostly on behalf of their organisations, did not agree on a common facilitation strategy. Mostly, participants showed preferences for either the seminary model or local diocesan schemes model (refer to Chapter Four; see 6.3).

Another critical learning focus revealed in the research processes and activities involving ACSA Ministry and Training case study participants, was the context within which the study was done: the Anglican Church denomination. Further to the concern about who should qualify as a clergy leader in the Anglican Church as discussed above, participants deliberated and debated about what Anglicanism entails. Because of the nature of the denomination as

detailed in Chapter Four, participants, depending on their spiritualities, expressed in both word and deed different understandings of Anglicanism. As a result of their participation in CLWs, participants were presented with the challenge of fostering inclusive approaches and methodologies in their facilitation of clergy leadership formation programmes and activities in ACSA, beyond their individual organisations.

The gaps revealed in participant understandings of the object of study (*facilitation of clergy leadership formation*) and the context within which the study was done (*Anglicanism*), necessitated mediation through expansive learning processes which I attend to in Section 9.2.2 in response to the second research question set for the study. Also, on the basis of the theoretical and methodological frameworks used in the study, I present in Section 9.2.4 the fundamental factors considered to have been the underlying causes of participants' conflicting understandings discussed in this section.

#### **9.2.1.2 Ministerial domain (do - doing)**

Criticality of contexts in collective work-related practices: In all the case studies involved in the study, participants learnt about the critical importance of contexts in which human beings engage in collective work practices. Put succinctly, participants learnt that ordained ministry is done in context. As such, participants were challenged to have an in-depth understanding of what was entailed by context in ordained ministry, thus acknowledging the indispensable relationship between *context*, *cognition* and *practice* in human development related programmes (Groome, 1980, p. 109). For instance, in the Cott case study, the design of curriculum courses in practical theology (refer to 6.4) was done in response to the need to give equal emphasis to experiential learning in the clergy leadership formation programmes and activities at the College which underscores the relevance of the Vygotskian conceptualisation of human cognitive development as discussed in Chapter Seven.

In addition, the study emphasised that context has multiple levels within which phenomena, *facilitation of clergy leadership formation* in the case of this study, evolve with the passage of time, thus emphasising the importance of history in this study as discussed in Section 9.2.4. In the context of the Anglican Church, the multiple levels would take the structure of parish, archdeaconry, diocese, province and global communion which Chapter Four of the study details. Participants were therefore challenged to engage the object of study from the

perspectives of these different levels of the denomination as opposed to taking an exclusive approach on the issues under discussion.

Thus, participant engagements on the object of study revealed the impact of contextual socio-political, cultural and economic realities on both individuals and the collective. Entrances into the interactions evidenced participants' pre-conceived understandings of the aspects of the object of study under discussion at any given point which, in the course of the collective engagements, were adjusted or affirmed by contributions from other participants. This process did not always run smoothly as individuals at times tended to hold onto their pre-conceived understandings.

As a result of the integration of diverse perspectives, individuals were challenged ontologically and epistemologically within the ambit of the object of study. For instance, regarding discussions on what was meant by *ordination* in the life and work of the church, the Anglican Church in particular, participants were challenged to understand the concept as a calling to serve God across contexts. In view of the focus of the object of study, such a perspective would have implications on the approaches and methods selected to facilitate clergy leadership formation programmes and activities in a given context, ACSA in the case of this study. In view of these collective deliberations and processes, Engeström would conclude that “people and work organisations are all the time learning something that is not stable, not even defined or understood ahead of time ... new forms of activity are literally learned as they are being created” (2001, p. 134). I develop this observation in Section 9.2.4 in response to the 4<sup>th</sup> research question.

Ministerial skills: Participants were provided with opportunities to reflect on effective skills which would be required of both formators (MKOs in Vygotskian parlance, Vygotsky, 1978, p. 88) and ordinands as practitioners in ordained ministry summarised below. In view of the nature of the Anglican Church denomination as discussed in Section 9.2.1.1, participants were challenged to reflect on ministerial skills which would promote inclusive ministries such as the following:

*Embracing ambiguity:* Participants would be required to embrace, internalise, process and utilise new knowledge in their practices. This would be possible if individual clergy leaders were unafraid to have their denominational understandings and faith beliefs challenged by contextual socio-political, cultural, ideological, and religious perspectives. This would

require clergy leaders to be humble and brave to ‘untool’ (*let go what is no longer relevant*) and ‘retool’ (*reinforce with currently relevant and effective*) ministerial skills which would make them lifelong learners. In Bourdieusian language, this would be the challenge to deal with the *habitus* (Wacquant (2005, p. 316; refer to 2.4) towards an understanding of power as *power with* and *power within* (VeneKlasen & Miller, 2002, p. 55). In relation to the Cott case study, formators were challenged to foster a culture of learning in their work at the College (refer to 6.3.7).

*Collaborative clergy leadership practices:* In line with the teaching of the gospel message which emphasises unity, transformation of unjust systems and empowerment of the victims of such systems, clergy leadership understood in this sense would prioritise collaborative practices. This would entail selfless service made manifest in the creation of work-place environments which aim at enabling all organisational members on the basis of their gifts and abilities in pursuance of a shared vision. This would counteract the culture of *gate-keeping* which participants said was experienced in some parts of ACSA (refer to 6.3). An ingredient of such clergy leadership would be the practice of *mutual ministry review* at a local level to ensure continued alignment with the vision and mission of the organisation (ACSA); assessment and evaluation of operational determinants in Anglican Church practices such as vision crafting, accountability, integrity, faithfulness, diligence and fairness.

In relation to the ACSA Ministry and Training case study, the considerations above were associated with the responsibility of training rectors (refer to 6.3). In relation to transforming understandings of leadership, such practices would underscore the assertion that power in organisations exist in and through relationships, implying that it is “fluid”; “ubiquitous”; “pervasive” and always “fluctuating” (Hayward, 1998, p. 21).

*Reflexivity:* In observance of the importance of the contextual settings in which clergy leadership is practised, the study emphasised that it was important for clergy leaders to practice reflexivity which is a skill that happens at the interface of theory and practice and can be learned (refer to 9.2.1.1). Sayer (2011) supports this understanding by explaining that as individuals, human beings are endowed with unique abilities to reflect and deliberate on their experiences, particularly expressing those things which matter to them faithfully and with commitment. Sayer goes further to assert that the conviction in the existence of such human potential negates the modernist perspective which in essence advances the opinion that people become what society has made them to be (*over-socialised*). Sayer’s argument

concur with Archer's (2003) concept of *internal conversation* on the basis of which she avers that human beings have causal powers to be and to do; emergent and contingent (p. 16). In Section 9.2.4 I explain how agency is an important conceptual tool in the study. In the recommendations for the study in Section 9.4, I suggest how agency could be used as a conceptual tool in on-going expansive learning programmes and activities on clergy leadership formation in ACSA.

### 9.2.1.3 Spirituality domain (*being*)

Leadership is a total way of life, a way of living our humanity, a form of implementing one's philosophy of life, a way of looking at one's self-identity and destiny. (Dohan, 2007, p. 79)

Reflections done with participants in the study, particularly in Section 6.2, emphasised that reaching the state of *being* in clergy leadership is actualisation of the most profound level of practice in ordained ministry. Clergy leaders who reach this level of formation serve sacrificially, selflessly, compassionately, and prophetically in solidarity with the socio-politically and economically marginalised. In counteraction to the challenges experienced in ordained ministry, such clergy leaders find fortitude in practising the Christian spiritual traditions modelled by Jesus Christ who is the foundation of the Christian faith (refer to 4.3). Through living such spiritual habits, these clergy leaders are able to discern the Will of God in their practices.

Thus, participants were challenged to *re-fashion* (Harris, 1989) their own ministries in accordance with the Jesus model which would enhance their facilitation skills in clergy leadership formation programmes and activities. In social theorist conceptualisation of power (in leadership), the challenge posed for participants here was to move away from "leader-centric" theoretical orientations to understandings which emphasise that power in organisations "belongs to the group and remains in existence only so long as the group keeps together. When we say of somebody that he (she) is in power, we actually refer to his (her) being empowered by a certain number of people" (Arendt (1970, p. 44).

### 9.2.2 Finding 2

<b>Responding to the research question:</b> <i>How can such learning be <u>expanded</u> amongst key participants?</i>
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The instrumentality of concepts as mediational tools in clergy leadership formation practices was evidenced in the deliberations which preoccupied the CLWs in the two case studies of the study (refer to 6.2 and 6.3). The concepts used were drawn from the theoretical frameworks upon which the study is built which include critical realism, CHAT, and leadership theory. In Chapter Seven, I used the Vygotskian conceptualisation of human consciousness development to deepen reflections on how the theoretical and methodological frameworks used in the study could be considered as the guiding framework for on-going expansive learning programmes and activities on clergy leadership formation in ACSA. In Section 9.4, I give recommendations of how those processes and activities could be organised.

Thus, through CLWs, the CHAT framework used in the study enabled participants to engage in activities which generated solutions to address historically and socio-culturally rooted contradictions currently encountered in their work practices (addressing issues discussed in 9.2.1 and 9.2.4). For instance, in the ACSA Ministry and Training case study, participants were taken through an exploration of the history of clergy leadership formation practices in ACSA with the objective of unveiling the criticality of history as a mediational conceptual tool in the deliberations (refer to 6.2). Deliberations on curriculum related matters was the focus of CLWs in the Cott case study (refer to 6.3).

Consequently, participants were enabled to expand their learning about their work practices and organisational cultures and values, thus equipping them with “reflective systemic analysis” skills which would capacitate them to engender and promote change in their professional practices (Warmington et al., 2005, p. 89). To that extent, the CHAT epistemological framework was effective as a methodological tool and, to a limited extent, as an analytical tool.

Further, the study employed the critical realist philosophical and ontological perspective of “underlabouring” (Bhaskar, 1979) to complement CHAT in surfacing the underlying causal mechanisms of the contradictions which were encountered by the participants in their work engagements (issues which will be covered in Section 9.2.4).

### **9.2.3 Finding 3**

<p><b>Responding to the research question:</b> <i>What are the clergy leadership formation collaborative practices that can be expanded through learning in this context?</i></p>
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The study has confirmed that ACSA is awash with educational, training and ministerial formation programmes which are aimed at affirming and equipping people who offer themselves to serve in different church leadership responsibilities which include clergy leadership. Accordingly, the interactions which were done with diocesan representatives and observations made during the visitations to selected dioceses in ACSA during the study, attested to the impression which I had formed during the contextual profiling stage of the study (refer to 1.2.3) about the existence of such structures at both diocese and provincial levels. These structures function both independently and inter-connectedly (refer to 1.2.3; Chapter Five and Six). Additionally, these structures are headed by people who are selected on the basis of their educational and ordained ministry profiles, even though in some cases individuals selected were thought ill-equipped for the responsibility (refer to 6.3). It was therefore appropriate that this study involved some of the structures (activity systems) in existence and formators who were involved at both diocese and provincial levels. Thus, ACSA provided me with an ideal research context for the development of the goals and objectives of the study.

Therefore, the state of affairs in ACSA provided for possibilities of expansion in clergy leadership formation collaborative practices in the following ways:

- The existence and participation of multiple activity systems in clergy leadership formation in the province (ACSA);
- Regular meetings, deliberations, consultations on the object of study in the province with the objective of improving understandings and practices. This suggests diocesan interest, commitment and support to continue being involved in discourses on clergy leadership formation with other dioceses and interest groups or organisations in ACSA and abroad;
- At a provincial level, the existence of constitutional stipulations and canons on the object of study (ACSA Constitution and Canons, Act XIV/5; Act XIV/6, 2014, p. 169); research on and undertaking of programmes such as the short-lived Leadership Development Programme (2012-2014); and colloquium initiative by Cott (2013) suggest an interest and commitment in the object of the study;
- Research work done by Pityana and Pato (1995) and Pato (2001) (refer to 1.3) having been mandated by the provincial office also contributed to the value placed on clergy leadership formation in ACSA.

In line with the goal of the study to explore collaborative practices on the object of study which could be expanded through learning, research findings showed that the structures (activity systems) in existence encountered contradictions across the case studies used in the study. These contradictions necessitated and were the key drivers of the expansive learning meditational processes and activities (Engeström, 1997) which I facilitated in the study (refer to Chapter Five and Six).

Regarding the ACSA Ministry and Training case study, the study concluded that the root of all the conflicts and misunderstandings which had been exposed in the deliberations on clergy leadership formation programmes and activities was located in agency at the two levels of leadership in the work and life of ACSA which are the positions of clergy (priests and deacons) and bishop. In the form of a question, the modelled solution in response to the surfaced contradiction was: If clergy and bishops are short of understanding and clarity of what their roles entail in the life and work of the church, ACSA in particular, how would they be in a position to serve as transformational, transformative, or incarnational formators? In particular, how would they model ordained ministry to those in clergy leadership formation?<sup>100</sup> It was agreed that there was a need for more deliberations on these issues with the input of the highest leadership office in ACSA, the proceedings of which were beyond the scope of this study (refer to 6.2).

An important aspect of the object of study, theological education, was the focus of attention for the Cott case study as a result of the outcomes of a Vision and Mission statement review process which had preceded an organisational workshop on curriculum enhancement (refer to 6.3.3; Figure 6.8). The CLWs which were facilitated in conjunction with the organisational curriculum review processes and *mirror data*, generated key issues which needed continued deliberations with the objective of making a contribution in the facilitation of clergy leadership formation in ACSA towards transforming and collaborative practices. The key contradictions revealed were: a lack in organisational learning and a lack in collaborative practices with organisational partners; necessitating the need to foster a culture of learning and reinforcement of collaborative practices with organisational partners (refer to 6.3.7).

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<sup>100</sup> The Vygotskian conceptualisation of the Zone of Proximal Development is suggested in Section 9.4 as a possible conceptual tool to use in on-going deliberations in response to issues raised here about the role of formators (MKOs in Vygotskian language) in clergy leadership formation programmes and processes in ACSA.

In Section 9.4, I give ideas of how on-going expansive learning programmes could be facilitated in ACSA in response to the contradictions revealed in the study across the case studies used, as summarised above.

#### 9.2.4 Finding 4

**Responding to the question:** *What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence learning in this context?*

In pursuance of the goal *to surface and critically interrogate underlying causal mechanisms that have shaped and continue to influence facilitation practices in clergy leadership formation in ACSA*, I did retroductive analysis (beyond inductive and abductive data analyses) in Chapter Five, Six and Eight). Having analysed collected data on the basis of what I had experienced in the interactions with the participants and what I had observed during the course of the research interactions, I moved a level higher in the analysis to enquire what must be and must have been the circumstances for clergy leadership formation practices in ACSA to be what it currently is, and what has been from the inception of the province. The objective of the exercise was to decipher explanatory principles and causal mechanisms in relation to emerging clergy leadership formation models and practices in ACSA across the activity systems involved. The sub-sections above have alluded to most of these factors but, for purposes of clarity, I summarise them in the table below.

**Table 9.1: Causal mechanisms surfaced in the study across the two case studies used**

CAUSAL MECHANISM	MANIFESTATION OF CAUSAL MECHANISM IN THE STUDY
<b>History</b>	The study explores how clergy leadership formation practices have evolved in ACSA on the basis of the history of the province in the broader context of the Anglican Church denomination and Christianity in general (concept formation). As such, history is used in the study both as an analytical and organisational transformation mediational tool (see Chapter Four, Five and Six). This causal mechanism applies mostly on ACSA Training and Ministry case study (refer to Chapter Five and Six).
<b>Context</b>	The study has shown that context has emergent causal powers (Archer, 2003) which may be directly related to organisational cultures and operational processes or may come about as a result of the socio-political, ideological, racial, economic, religious, cultural and traditional developments happening in the broader geographical context of the organisation in question. In the case of this study, the broader geographical context of the location of ACSA is Southern

	Africa, particularly in relation to South Africa, Swaziland, Namibia, Mozambique, Lesotho and the Island of St. Helena. Research findings confirmed that contextual causal powers have impacted clergy leadership formation practices in ACSA in terms of programme conceptualisation, planning, designing, facilitation, assessment and evaluation (refer to Chapter Four, Five and Six).
<b>Structure and Agency</b>	The interplay between structure and agency has emerged as a critical factor in relation to the manner in which clergy leadership formation practices have evolved in the Anglican Church, ACSA in particular. Research findings have revealed that individual clergy leaders at all levels of ordained ministry leadership have influenced and continue to influence the manner in which clergy leadership formation programmes and processes in the Anglican Church, ACSA in particular, have been conceptualised, planned, designed, facilitated, assessed and evaluated. Accordingly, the study has used a critical perspective of leadership to engage clergy leadership formation models emerging in the research findings (refer to Chapter Four, Five, Six, Seven and Eight). Equally, the research findings have made bare the importance of structures responsible for clergy leadership formation programmes in ACSA, particularly when they are able to work collaboratively. Accordingly, the study concludes with recommendations on how structures involved in clergy leadership formation programmes and processes in ACSA could work collaboratively (refer to 9.4).

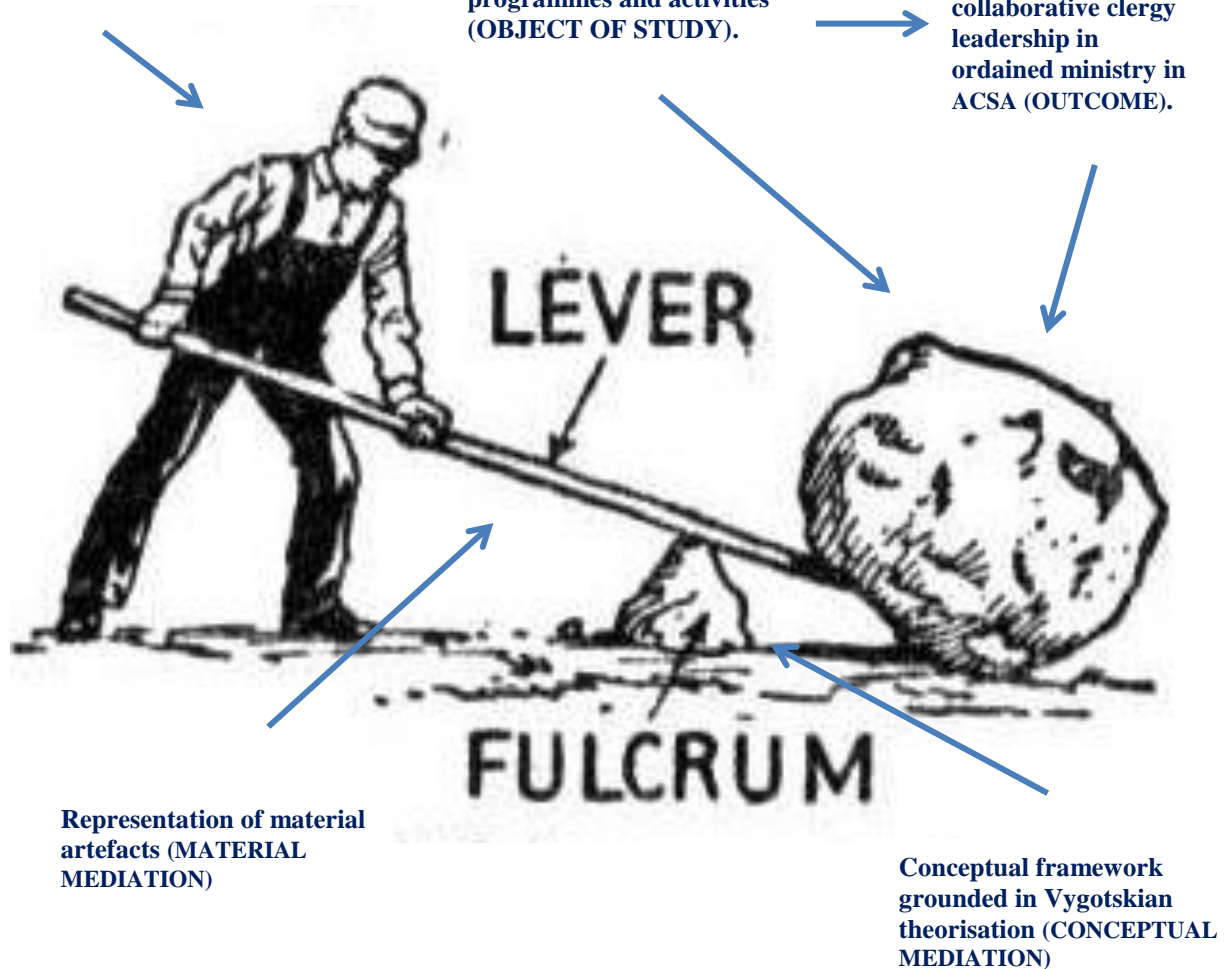
### 9.3 CONCLUDING REFLECTIONS

The study has prioritised the instrumentality of conceptual tools in pursuance of the goals and objectives of the study in relation to clergy leadership formation practices in ACSA. On the basis of the Vygotskian conceptualisation of human consciousness development as discussed in Chapter Seven, I developed a conceptual framework which encapsulated the transformatory and emancipatory emphases ingrained in the theoretical and methodological frameworks which were used in the study (refer to Chapter Two and Three). The conceptual framework was used to critically engage emerging models of clergy leadership formation in ACSA in Chapter Eight. In Section 9.4, I make recommendations for on-going usage of the conceptual tools in expansive learning on clergy leadership formation practices in ACSA.

**SUBJECT(S):**  
Formators; MKOs  
(Vygotsky, 1978).

Clergy leadership formation  
programmes and activities  
(OBJECT OF STUDY).

Transforming and  
collaborative clergy  
leadership in  
ordained ministry in  
ACSA (OUTCOME).



*Figure 9.1: Illustration of the theoretical, methodological and conceptual frameworks which were used to develop the object of study towards transforming and collaborative practices in ACSA*

Figure 9.1 is a diagrammatic representation of the theoretical, methodological and conceptual frameworks which were used in the study as explained above. The initial diagram of a person manipulating a heavy object with the use of relevant and efficient tools captures the whole idea behind the manner in which the object of this study, clergy leadership formation in ACSA, was handled. The person behind the lever is representative of the formators/participants who, collectively deliberated and debated in CLWs on how clergy leadership formation programmes and activities in ACSA ought to be conceptualised, designed, planned, facilitated and managed.

Agency in clergy leadership formation programmes and activities in ACSA were deliberated on in the study on the basis of the understanding that learning through collaborative leadership practices is forged when those in leadership mobilise others to want to get extraordinary things done in organisations; “it’s about the practices the leaders use to transform values into actions, visions into realities, obstacles into innovations, separateness into solidarity, and risks into rewards” (Kouzes & Posner, 2004, p. xvii). This understanding aligned very well with the theoretical and methodological frameworks which were used in the study in relation to the goal to expand understandings of clergy leadership formation practices in ACSA through learning.

In agreement with Kouzes and Posner (2004), John Roberto (2006) argues that:

A collaborative and empowering style of leadership is required for lifelong faith formation. This style of leadership needs to be present not just in one person, such as the pastor or director of religious education; it needs to be present in the leadership style of the entire parish staff and ministry teams responsible for fashioning, implementing, and facilitating lifelong faith formation. Since lifelong faith formation is related to every aspect of community life, it requires collaboration among all the various leaders and ministries. Team work and collaboration are essential for effective planning and implementation. (2006, p. 125)

Roberto’s argument concurs with the emphasis which was placed on the criticality of participant reflexivity in clergy leadership formation programmes and activities in the church, ACSA in the case of this study (refer to 7.3).

Further, in addition to the above reflections on participant reflexivity, Engeström observes that even though management structures such as the activity systems which were involved in ACSA clergy leadership formation programmes and activities in the study may be in existence in organisations,

[T]he increasingly societal nature of work processes, their internal complexity and interconnectedness as well as their massive volumes in capital and capacity are making evident that, at least in periods of acute disturbance or intensive change, no one actually quite masters the work activity as a whole though the control and planning of the whole is formally in the hands of the management. This creates something that may be called “grey zones”, areas of vacuum or “no man’s land”, where initiative and determined action from

practically any level of the corporate hierarchy may have unexpected effects.  
(1987, pp. 113-114).

Engeström's observation reinforces the CHAT perspective regarding expansive learning processes in contexts such as ACSA where people (agents) ought to work collectively and collaboratively towards a common object and outcome; what Wenger (1998) calls "communities of practice". In particular, the theoretical injunction that "in expansive learning, learners learn something that is not yet there ... learners construct a new object and concept for their collective activity and implement this new object and concept in practice" (Engeström et al., 2010, p. 4) is emphasised in the methodological and conceptual frameworks used in the study (illustrated in Figure 9.1). In concurrence with Engeström, Lave (1996, p. 18) asserts that meaning in organisational programmes such as clergy leadership formation practices in ACSA "is not created through individual intentions; it is mutually constituted in relations between activity systems and persons acting, and has a relational character" (Lave, 1996, p. 18).

## **9.4 RECOMMENDATIONS (NEW KNOWLEDGE)**

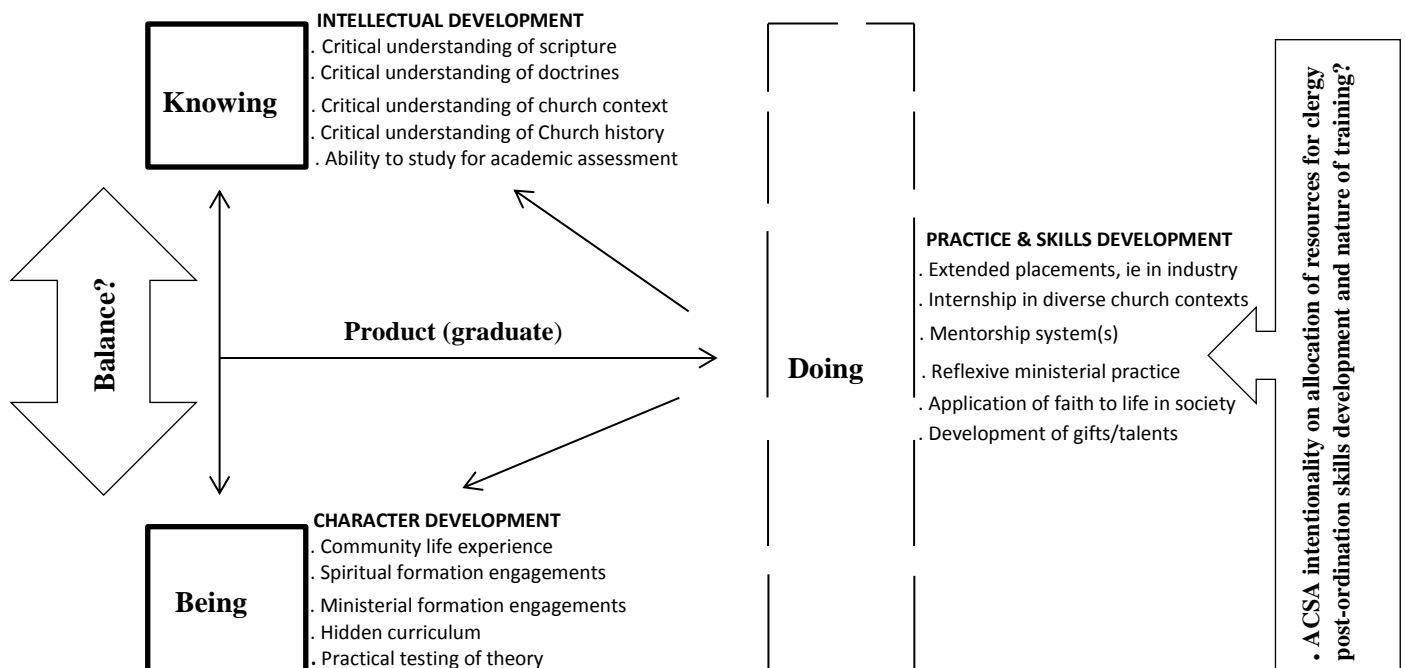
### **9.4.1 Collaborative and transforming model of clergy leadership formation in ACSA**

I re-modelled the diagram which I used in Chapter Eight (Figure 8.6) to encapsulate an emerging transformational, embodied and incarnational model of clergy leadership formation in ACSA, to recommend a perspective which ACSA could consider to use in future deliberations on the object of study, particularly in relation to the key research findings across the case studies which were used in the study which I discussed in the previous section.

On the basis of what was explained as an emerging model of clergy leadership formation in ACSA in Chapter Eight (refer to 8.3.3), Figure 9.2 illustrates a well-coordinated, well networked, operationally aligned organisational working environment. The model is illustrative of how the activity systems which are involved in clergy leadership formation in ACSA could collaborate towards transforming transformational, transformative, incarnational and embodied practices.

To realise the envisioned balanced operational framework in the organisation as the arrows in the diagram show, the dioceses, which constitutes the ACSA ministry and training case study in the study, and Cott, would be required to give equal contribution to the processes and

activities which relate to clergy leadership formation as emphasised in the study which include programme conceptualisation, design, facilitation and management. Coming from the right side of the diagram is what may be termed the “diocese loop” which ought to meet with the “Cott loop” in the “doing” sphere of the clergy leadership formation framework. The “diocese loop” ought to acknowledge the importance of “knowing” and “being” which are formation spheres predominantly in the responsibility of the “Cott loop”, hence the arrows which point to the two spheres in question. On the other hand, the “Cott loop” ought to recognise the indispensability of the “diocese loop” in the whole process of clergy leadership formation, hence the arrow that runs across the diagram pointing in the direction of “doing” which is a formation sphere predominantly in the responsibility of the “diocese loop”.



**Figure 9.2: Illustration of a recommended model of clergy leadership formation in ACSA**

The broken lines which frames “doing” suggests the porousness of this formation sphere, implying that it should be understood as everybody’s business between the “Cott loop” and the “diocese loop”, hence the full recognition in the study of the input of para-church organisations, such as Hope Africa, in clergy leadership formation programmes and activities in ACSA (refer to 5.2.3, 5.4.3; Figure 5.4, 5.5). The design of practically orientated courses at Cott in response to

curriculum gaps which had been surfaced, discussed and resolved during a curriculum enhancement workshop, contributed towards realisation of a balanced clergy leadership formation programme at Cott (refer to 6.3.7; Annexure 6.3, 6.5 and 6.6). To a significant extent, these informed deliberations and considerations would help in creating grounds of commonality for Cott formators (and students) particularly in relation to issues concerning curriculum conceptualisation, design, facilitation, assessment and evaluation (refer to 6.3).

Such collaborative practices between the two loops would ensure that practice-based concerns in clergy leadership formation in ACSA would be brought into the theological education, spiritual and ministerial formation discourses (which mostly pre-occupy seminary [Cott] teaching and learning activities) with intentionality and corresponding emphasis. When that happens, the “embodiedness”, “incarnatedness”, transforming, transformational and transformative model of clergy leadership formation in ACSA would be actualised in both theory and practice.

In the same vein of thought, such a model would require the agency of personnel (formators) with correspondingly similar leadership attributes as those descriptive of the envisioned clergy leadership formation model in ACSA. For instance, “embodiedness” would require the formators to be people who were grounded and cultivated in their understanding of the life and work of the church, particularly the Anglican Church at both Communion, provincial, diocese and parish levels as presented in Chapter Four; and the role of clergy in the church in relation to the world, particularly local communities, which was Archbishop Thabo Makgoba’s concern as implied in his statement which was alluded to in the study (refer to 8.2.1). In a nutshell, these would be people who are “theologically informed, critical, ethical, and morally conscious” with a mandate to facilitate “rigorous, diversified, resourced and up to standard theological education and clergy formation programmes and processes in ACSA” (refer to Figure 5.2, 5.4, 5.6, 5.7).

#### **9.4.2 Mediation conceptual tools**

The essence of data analysis in qualitative research is concisely captured by Danermark et al. (2002, p. 200) when they advise that:

In order to understand and explain the social world, as scientists we try to understand and explain what meaning actions and events have to people, but we also endeavour to produce concepts, which make it possible to transcend common sense and attain a deeper understanding and explanation of a more abstract character. This is called the double hermeneutic of social science.

In order to ensure effective facilitation of clergy leadership formation programmes and activities in ACSA, mediation artefacts would need to be carefully thought about in relation to the issues covered in the formation programme and activities at any given time (refer to 8.3.2; Figure 8.2). The study has emphasised that, in addition to material artefacts which may be available or sourced in the given context, conceptual tools also help to reinforce effectiveness in the facilitation of clergy leadership formation programmes and activities (refer to 7.2.4.1; Figure 7.2, 7.3). Figure 9.1 illustrates the critical role that conceptual tools ought to play in the conceptualisation, design, facilitation and management of clergy leadership formation programmes and activities in ACSA.

Beyond CLWs, the study has emphasised that the participants (formators) would need to continue with expansive learning programmes and processes in their organisations, particularly in response to the issues which emerged during the CLWs which were facilitated in the study. As discussed in Section 7.2.4.1, the participants who were involved in the CLWs were empowered with conceptual tools on the object of the study which they could use in their continuing involvement in the practice (refer to Figure 7.3).

Sannino, in her paper entitled *“From talk to action: Experiencing interlocution in developmental intervention”* (2008) reflects deeply on the need to put into practice *thought* and *talk*, which is an issue that is left unattended to in most educational and practice orientated engagements such as expansive learning processes and activities. She asserts that the transformative power of *thought* and *talk* “resides not in the voices themselves, but in the way the voices are received and internalised” (2008, p. 244), which would be expected to culminate in relevant contextual (embodied, incarnated) action. In other words, Sannino encourages testing the “do-ability” of conceptualised programmes and activities.

#### ***9.4.2.1 Application of conceptual tools on CLW outcomes***

Guided by Sannino’s practice orientated reflections as explained above, and remaining within Engeström’s (1999) framework of the ELC (refer to Figure 3.9), I illustrate how Senge’s ideas about what he calls a “learning organisation” and the concept of “double stimulation” (Engeström, 1999; refer to 7.2.4.1; Figure 7.2) can be applied on the issues that emerged from the CLWs which were facilitated in the two case studies used in the study (refer to 6.2 and 6.3). In line with the ELC framework, this activity is located within Action 4, “examining the new model” (see Figure 2.8).

Senge (1990, p. 3) defines a “learning organisation” as a place “where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, collective aspiration is set free, and where people are continually learning to see the whole together”. This is a perspective about organisations which can be employed to mediate the “double bind” that is confronted by each of the two case studies on matters relating to clergy leadership formation in ACSA, as presented in Section 6.3 and 6.4. In addition, the perspective also connotes Mezirow’s (2000) theorisation of “transformative learning” which has been discussed in the study as an enabling conceptual tool for participant/practitioner reflexivity (refer to 7.3).

In particular, Senge’s five disciplines or models are a powerful illustration of how ideas can be used as a basis for transformational and transformative programmes and processes in organisations such as ACSA, which I illustrate below.

**Table 9.2: Illustration of application of conceptual tools in response to CLWs findings**

<b>Models</b>	<b>Explanation of model</b>	<b>Application of model on CLWs</b>
<b>Personal mastery</b>	Senge says that individuals with a deep desire to learn are pivotal in organisational learning. Further, Senge explains that this is a participant orientation which includes but goes beyond competence, skill and spiritual growth in the personality and character of an individual. These are self-driven individuals, what Archer (2003) calls “1 <sup>st</sup> person type of leader.”	In both case studies, individual participants would be challenged to reflect deeply on who they are as clergy and formators before they can be part of a collective working towards a specified organisational vision and mission. It would therefore be expected that as participants continue working together, they would be confident in what they are able to contribute to the organisation in addition to appreciating what others are able to contribute towards the same course.
<b>Mental models</b>	Senge describes these as perspectives which people develop about phenomena as a result of socialisation which would agree with Hays’ (1994) definition of culture (refer to 7.2.2.1); experiences in life; levels of education; or ideological persuasions. Philosophically speaking, these are ontological orientations through which individuals enter into the world and the basis on which they engage with the world.	The issue of <i>orientations</i> was implied in how individual participants presented their contributions during the CLWs. In both case studies, <i>where</i> and <i>how</i> individuals were educated and trained for priesthood, management or teaching had a bearing on how individuals explained themselves or, in some cases, refused to accommodate other people’s perspectives. While diversity of opinion has a good side to it in collective practices, it can be disruptive and counter-productive if it is not well managed.
<b>Shared vision</b>	In a shared vision, Senge emphasises the ability of organisational members to have a common understanding of the future of the organisation to which they are committed as individuals and as a collective. A shared vision is particularly important when a new person is taking over the leadership of the organisation or when an organisation is going through a period of change (organisation development).	In both case studies, the surface impression that one generated was that individuals were more conscious of what the subjects or topics under discussion required of them and less about how the issues under discussion were aspects of the vision and mission of ACSA. As such, most of the time individuals were <i>on their own</i> . This was more pronounced in the ACSA ministry and training case study where individuals seemed to be more influenced by their type of spirituality and how they did things in their different contexts.

<b>Team learning</b>	According to Senge, team learning is realisable when personal mastery and a shared vision are in place. Senge (1990, p. 236) describes this as “the process of aligning and developing the capacities of a team to create the results its members truly desire”. For this to happen, individuals would be required to prioritise the needs of the organisation or group ahead of individual needs or preferences. Dialogue is of paramount importance in this model.	Because personal mastery and shared vision between the participants in the two case studies were not quite in place, it meant that participants needed to do more work in those two models before meaningful team work could be forged. The quest for collaborative practices in clergy leadership formation in ACSA was a critical aspect of the purpose of the study. The outcomes of the CLWs affirmed that participants in clergy leadership formation in ACSA (formators) needed to work harder towards fostering collaborative working environments in their responsibilities as formators.
<b>Systems thinking</b>	Senge explained that this model was the cornerstone of a learning organisation which means that the other models are encapsulated in this model. Senge’s argument is that successful organisations are wholesome in their perspective, implying interrelatedness in all organisational processes, programmes and activities. Failure in one part or division of the organisation would impact the whole organisation.	Participants did not show an immediate alertness of the relatedness of issues discussed during the CLWs and everything else that contributed to the life and work of ACSA, not just the subject of clergy leadership formation. For instance, it was highlighted in the CLWs with the ACSA Training and Ministry case study that church growth dynamics had a critical bearing on clergy leadership formation deliberations and considerations (refer to 6.2). This, therefore, is highlighted as one of the key areas where participants would need to do more work in their continuing practices as formators in clergy leadership formation.

Senge (1990)’s conceptualisation of a “learning organisation” assisted me to streamline some of the specific areas which would need to be attended to in on-going facilitation of clergy leadership formation programmes and processes in ACSA. What this means is that in their continuing practices, participants/formators were challenged to engage in more expansive learning programmes and processes to resolve the streamlined issues of concern in the study (contradictions). A step further in the application of conceptual tools beyond Table 9.1 would be to apply some of Vygotsky’s concepts which were discussed in Chapter Seven on each of the components of Senge’s conceptualisation.

Since Senge (1990) asserted that “systems thinking” was the cornerstone of a “learning organisation” as the model encapsulates all other spheres of learning constitutive of an organisation, I suggested in Table 9.2 what could be considered by ACSA clergy leadership formation formators as conceptual mediation tools (drawn from research findings) to resolve issues needing continued expansive learning as streamlined in Table 9.1.

***Table 9.3: Application of Engeström (1999)’s concept of “double stimulation” on CLW findings***

<b>ONTOLOGICAL DOMAIN</b>	<b><u>EXAMPLES OF STIMULUS 1: DOUBLE BIND</u></b>	<b><u>EXAMPLES OF STIMULUS 2: CONCEPTUAL MEDIATION TOOLS</u></b>
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<p style="text-align: center;"><b>STRUCTURE</b></p>	<ul style="list-style-type: none"> <li>•Our <u>ecclesiology</u> (perspective about church) mitigates the need to collaborate – some of our dioceses and parishes exist as independent kingdoms, some of our bishops and clergy jealously guard what they have in their dioceses or parishes.</li> <li>•Working in silos – we do not do it intentionally. It is how the church works.</li> <li>•In his conceptualisation of <u>socialisation</u>, Groome (1980) uses the term <u>objectification</u> to emphasise that once social systems and structures have been instituted to regulate people’s activities (agential projects) and relationships, they instantly assume a life of their own (<i>reification</i>) and all human beings (their creators) can do, besides transforming them, is to comply to what they stipulate. Groome observes that such a situation helps to create stability in the community as individuals, across the spectrum of communal engagement, are forced to comply with the systems and processes in place. Behaving contrary to the stipulations of these systems and structures would be meted with sanctions and reprimand against defaulters (Groome, 1980).] This is problematic in ACSA as Dioceses have <u>jurisdictional autonomy</u> to decide on how they choose to do things which may contradict with provincial pronouncements. The same applies to provincial jurisdictional autonomies in relation to Anglican Communion regulatory mechanisms regarding polity, doctrine, practice of the faith, etc</li> </ul>	<ul style="list-style-type: none"> <li>•The study needs to problematise concepts such as communion, western, African, discourse, context. Context teaches us; context provides us with content.</li> <li>•Because this research is contextualised in Africa, there is need to acknowledge the possible influence which African philosophies such as Ubuntu and communitarianism could have on the data gathered.</li> <li>•Ecumenism should be strengthened across ACSA and not be limited to higher levels of organisational engagements such as the Synod of Bishops.</li> <li>•Contextual exposure opportunities – partnerships between dioceses in ACSA should be strengthened, particularly in relation to mission in its holistic sense. For instance, mission focus between dioceses could be on personnel resource enhancement. An example of such collaborative possibilities, emerging from research data, could be mediation in the area of communication skills between the Diocese of Niassa (predominantly Portuguese speaking) and a resourced diocese in that particular need such as the diocese of Cape Town. A resource person in the identified area of need could be sent to spend an extended period of time in the diocese of Niassa, with a mission goal to empower local personnel with English language competency skills. This is a model of church leadership emerging in the Early Church (New Testament times). This encourages solidarity amongst dioceses in terms of sharing resources (material; expertise; knowledge; financial).</li> </ul>
<p style="text-align: center;"><b>AGENCY</b></p>	<ul style="list-style-type: none"> <li>•The concept <u>succession</u> is problematic when considered in the context of the Anglican Church. It is <u>counter-cultural</u> particularly where it relates to Anglican Church polity which does not quite facilitate opportunities for collaborative practices. <u>Human brokenness</u> is a hindrance to democratic processes in the Anglican Church.</li> <li>•Bishops tend to <u>groom</u> those they like who when presented for election for the position of bishop, do not usually receive the support of fellow clergy.</li> <li>•Some bishops in ACSA tend to rush to lay hands (ordain) on people who, at times, would not have met the full requirements for ordination as stipulated in the Provincial Acts and Canons.</li> <li>•A bishop or clergy person who understands Jesus Christ, as that one man who came to redeem humanity and the created order single - handedly would use such an understanding as the foundation of their ministry. Such is a problematic model of clergy leadership.</li> <li>•There are too many “administrators” in the dioceses and parishes as clergy tend to take responsibilities that should be done by other people, whether as employees of the diocese/parish or as volunteer membership of the diocese/parish. At times such cases deteriorate to levels of abuse of power.</li> </ul>	<ul style="list-style-type: none"> <li>•A <u>non-partisan</u> clergy leadership formation approach is advocated for.</li> <li>•<u>Modelling strategy</u> – bishops should model leadership to all clergy who, in turn, would be required to do the same to junior clergy and those still in formation towards ordained ministry.</li> <li>•<u>Apostolic succession</u> - Church history informs of models of succession in church leadership which can be drawn from for guidance.</li> <li>•Clergy leadership roles should be considered on the basis of <u>what one is gifted in (talent identification, grooming and mentoring)</u>. It should not be assumed that everyone is called to parish ministry.</li> <li>•Model clergy leadership around <u>Christological understandings</u> and other transforming <u>models of biblical leadership</u>.</li> <li>•Clergy are not problem solvers but enablers; resource persons; facilitators of Christian identity formation and development.</li> <li>•Clergy should be taught to “let go”. This can be done in the context of <u>ministry review</u> processes at diocese or parish level.</li> <li>•Emphasise understanding of the work of the church as <u>Priesthood of all believers</u>; clergy responsibility as <u>authority, power with</u> and <u>power for</u> rather than <u>power on</u> as understood of</li> </ul>

	<p>•Clergy are dying in prime age. The majority are suffering burn-out; depression; disillusionment; despair which, in some cases, individuals resort to substance abuse.</p> <p>•The meritocratic perception of education has an influence on the mentality of the majority of our students.</p>	<p>the concept in the secular world.</p> <p>•Prioritise Clergy wellness programmes at both diocese and parish levels. Opportunities for social interaction at diocese or parish level can be created such as Family Day occasions.</p> <p>•Encourage <u>learning for transformation</u>: difference between surface, strategic and deep learning. Always, the over-arching purpose of the curriculum needs to be upheld and reinforced.</p>
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As emphasised by Engeström (1999) and supported by Mezirow (2000) through his “theory of transformative learning”, expansive learning activities are a process, implying that they go on and on in response to contradictions in organisational practices which, for as long as the organisation is still functional, will always surface. As such, what is suggested in Table 9.3 should not be understood as content which can be covered with finality within a particular period of time, but rather should be understood as issues which would require continual probing and deliberation for enhanced practitioner expertise and realisation of effectiveness in organisational practices, such as clergy leadership formation in ACSA.

#### ***9.4.2.2 Cott Parish Placement Supervision Programme***

To a greater extent, the previous section (refer to 9.4.2.1) is conjectural in the sense that the postulations by Vygotsky (1978), Engeström (1999) and Senge (1999) would require practical implementation to prove the “do-ability” of the proposed mediation strategy, in response to surfaced contradictions in clergy leadership formation programmes and activities in ACSA. In view of Sannino’s (2008) enquiring reflections on “thought and talk” on one side and “action” on the other, a follow up question that should be asked is: what practical evidence is available (already) to prove that the proposed mediation strategy in response to contradictions encountered in ACSA clergy leadership formation programmes and activities is implementable?

There is evidence available in response to the above. An opportunity was availed for me to co-facilitate a new academic programme in the organisation (Cott Parish Placement Supervision Programme) on the request that I draw from some of the theoretical and methodological tools which I was using in the study. The programme entailed collaboration with parishes in the different diocese where the concerned group of students were coming from. These were students who were in their final year of formation at the College. Therefore, the goal of the programme was designed to give the students opportunities to do reflections on the complementarity of theory and practice, in the year that they were completing their formation programme at the College. The parish placement programme was in the structure of blended learning whereby the students were

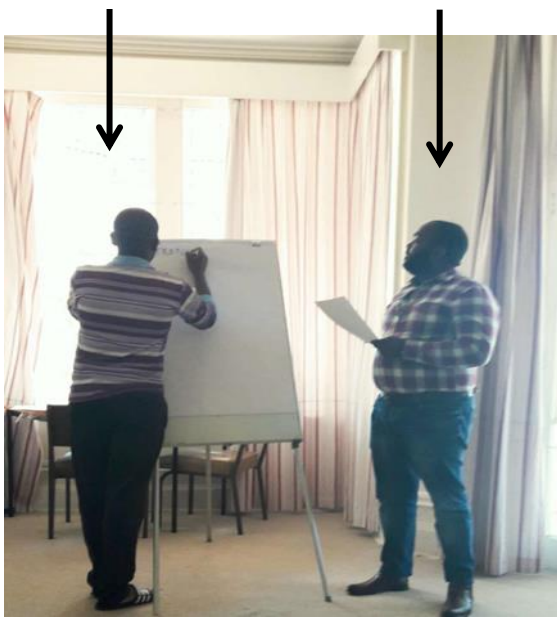
required to be in parish placement some of the time and the rest, excluding vacations, would be spent in contact learning at the College.

**Facilitator**



**Student**

**Parish Placement Supervisor**



**TASK FOR SUPERVISOR AND STUDENT:**

Having been taken through a suggested theoretical framework, which included the CHAT framework by Engeström (1987), the experiential learning framework by Kolb (1984) and the three legged stool framework of placement supervision by Leach *et al.* (2015), the supervisor and student were tasked to apply the conceptual framework on their context, brainstorming what may be enabling or constraining factors for realisation of the goals and objectives of the Parish Placement Supervision Programme.

**Figure 9.3: Demonstration of Cott Parish Placement student – supervisor interactions**

My main contribution to the programme, besides my normal responsibilities of teaching, was to assist with suggesting relevant conceptual tools which, in line with the goals and objectives of the programme, would be used to involve in workshops those who had been entrusted with the responsibility of supervising the students during their time in parish placement (parish placement supervisors). Accordingly, as illustrated in Figure 9.3, I was involved in the facilitation of the workshops together with other staff colleagues who had been requested to be part of the team by

the management of the College. In consideration of the nature of the programme, I had suggested that we use the CHAT framework, 2<sup>nd</sup> generation, to reinforce collectiveness, diversity, mediation tools, objects and the intended outcome of the programme on the basis of the information on the five principles of the CHAT framework (refer to 2.3). I received positive feedback from colleagues and workshop participants about the suitability of the framework in guiding expansive learning processes and other activities in the organisation that required collective effort. Some of the participants went a step further to say that they would share the framework with their bishops with a view to suggesting inviting me to do presentations in their dioceses during special occasions such as Diocesan Chapter meetings. They had been impressed by how the framework was able to bring into focus critical organisational issues in a succinct way. Others went beyond my expectations by saying that they would implement the framework in their families.

Annexure 6.5 summarises the findings from parish placement site visits for 2017 which I was involved in. The findings evidence the view held by socio-cultural historical theorists such as Engeström (1987) that for as long as an organisation or any other practice related entity is functional, contradictions would always surface.

## **9.5 OPENINGS FOR FURTHER RESEARCH**

A number of issues pertinent to clergy leadership formation in the context of ACSA which, because of the bounded nature of this study, were alluded to or deliberated in passing, could be the focus of future research programmes.

Because the study was done in the context of the church, ACSA in particular, an interest in the theological underpinnings of the study is befitting. In particular, future research work could be done around the subject *clergy leadership models* which would develop what was discussed in section 8.2.2 of the current study. On the same research interest, focus could be placed on the *role of formators* in clergy leadership formation programmes and activities which would develop what was discussed in Section 7.3 and 8.2.3 of the current study.

Another area of interest could be research around an investigation on understandings of the responsibility of clergy leadership particularly in the context of ACSA. There were indicators in the data collected for the current study that participants had diverse understandings of the role of clergy leadership at the different levels instituted by the church, ACSA in the case of this study (refer to 1.2). In some instances, there seemed to be confusion in participants as to

whether clergy leadership should be understood as a vocation or profession or both. The following participant statements point to this observation:

*We keep restating our desire for spiritual and moral formation, but we continue to be bedevilled by the status seeking “prince priest” model rather than emphasizing contextually rooted models of clergy formation. Perhaps we need to design and frame our programmes more in the model of Theological Education by Extension.* [Aint2] (Table 5.1)

*We need people formed as Christians first and Anglicans afterwards. We seem to miss the need for moral framework around priestly life and expectations – including integrity, self-giving, avoidance of theft and abuse of people, etc.* [Aint7] (Table 5.1)

Another area of potential interest for future research on the subject of clergy leadership formation is the issue of funding for theological education, spiritual and ministerial formation. This is an issue of on-going concern in the history of the work and life of the church, particularly ACSA (refer to 4.2.5 and 4.4). It is paradoxical to observe that the church, in some instances, is committed to build state-of-the-art properties but is hesitant to invest in people who would be, by way of reasoning, future custodians of the institution in both stewardship and pastoral ministry. This observation points fingers to what was discussed in Section 8.2.2 and also the implications of Archbishop Thabo Makgoba’s statement as discussed in Section 8.2.1.

Lastly, the issue of culture as a contextual phenomenon loomed in the research processes for the current study. Future research work could be done to investigate the influence of contextual phenomena such as culture on clergy leadership formation programmes and activities. This would develop some of the observations which were made during CLWs with ACSA ministry and training participants in response to *mirror data* on emerging models of clergy leadership formation in ACSA (refer to 6.2).

## 9.6 LIMITATIONS OF STUDY

The study - because it drew data from the context of the church, ACSA in particular, and was located in the Faculty of Education - interfaced two fields of academic research, namely: Education and Theology. However, the object of study (clergy leadership formation) by its nature, provided opportunities for engagement from any social science related perspective, hence the decision to choose the field of Education as the basis for the engagement. The difficulty with this setting of the study was the alertness with which I needed to present and

analyse the research findings, ensuring that I stayed within the academic research framework of the faculty under which I was doing the study. In some instances, involuntarily, I would slide into theological engagements as I presented reflections on research findings, which I had to correct myself about upon revising draft scripts.

Expansive learning processes require extended periods of engagement which I was not able to meet due to time constraints as it was a requirement that I finished the study within the duration accorded the study programme. In Section 2.3.3.3 I explained how expansive learning processes would continue in the organisation beyond the research period. In section 9.4.2.2 I discussed how the study had already found “footing” into the continuing work of the organisation.

In Section 7.4, I discussed the implications of the insider-outsider researcher status that I had in the study. In some instances, it was very difficult to negotiate the two sides to the dual status. Additionally, geographical accessibility and travelling costs were issues that I battled with in relation to research interactions with ACSA ministry and training case study participants. However, as explained in Section 6.2.1, I utilised fully the opportunities of meeting with the participants when they assembled at Cott for their annual consultation sessions.

## **9.7 CONCLUSION OF STUDY**

I started the chapter with Ecclesiastes 1: 9-10a which poses a question with ontological and epistemological insinuations about issues such as expansive learning programmes and processes. In relation to the study, this biblical injunction takes into account the critical importance of the history of clergy leadership formation programmes and activities in the Anglican Church, ACSA in particular, which is the pre-occupation of Chapter Four, Five and Six. A contextualised version of the question posed by the biblical text could be stated as: Is there anything that emerges as *new* about clergy leadership formation practices in the Anglican Church, ACSA in particular, in the different historical phases of the denomination? Chapters 4, 5 and 6 of the study would assist in attempts to answer such a question.

Further, in view of current and future practices in clergy leadership formation in ACSA, could it be said that formators have opportunities to continue learning in their involvement in

the practice? In section 9.4 I indicated what could qualify as new knowledge on the subject on the basis of the critical issues which emerged from research findings. In that sense, the study has added value to academic deliberations on the subject, particularly what could be understood as transforming and collaborative models of clergy leadership formation which those involved in the practices (formators) have learned from.

Additionally, the study has provided guidelines on how formators could conceptualise, design, facilitate and manage clergy leadership formation programmes and activities in the church, ACSA in particular. Specifically, the study strongly recommended the use of conceptual frameworks to deliberate on issues of interest regarding the object of study. I should acknowledge that what I suggested as new knowledge in the study complemented the obtaining practices on the subject in ACSA.

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# APPENDICES

## APPENDIX 1



**RHODES UNIVERSITY**

Grahamstown • 6140 • South Africa

9 May 2013

ACADEMIC ADMINISTRATION

Tel: +27 (0)46 603 8276/213 • Fax: +27 (0)46 603 8104 • E-mail: academicadmin@ru.ac.za

609C3108

Mr P Chinganga  
P O Box 77  
Grahamstown  
6140

Dear Mr Chinganga

### Acceptance : Degree of PhD (Education)

The Dean of the Faculty of Education has approved your registration for the degree of PhD (Education) in Education in the Department of Education, part time, in attendance. Your official academic year of first registration for this qualification is 2013. Professor H Van Der Mescht has been nominated as your supervisor. Dr C Grant has been nominated as your co-supervisor.

You are required to submit a research proposal for consideration by your Faculty Higher Degrees Committee (Vide *Higher Degrees Guide* page 9). Please liaise with your supervisor in this regard. The proposal should be submitted prior to the commencement of the research for your thesis.

You should please ensure that you are familiar with the contents and requirements of the *Higher Degrees Guide* (<http://www.ru.ac.za/applying/postgraduates/mastersanddoctors>). Please note in particular that you are required to give three months warning of your intention to submit for examination your thesis, half-thesis or research report (whichever is applicable). Failure to do so may result in delays in the examination process.

You are requested to note that continued registration for higher degree candidates is dependent upon a satisfactory annual report from your supervisor.

Please complete the attached acceptance of offer form and return it to academic administration.

If you require accommodation in one of the University's postgraduate residences, please pay a non-refundable deposit of R1550 and email proof of payment to [registrar@ru.ac.za](mailto:registrar@ru.ac.za)

Yours sincerely

Dr Stephen Fourie  
**REGISTRAR**

cc Head of the Department of Education  
Professor H Van Der Mescht  
Dr C Grant

**RHODES UNIVERSITY**  
Registrar's Division

**2013 -05- 09**

Academic Administration  
Grahamstown

## APPENDIX 2

### **LETTER TO A DIOCESAN OFFICIAL (DIOCESE OF GRAHAMSTOWN)**

I write to ask for your help in relation to my PhD research.

You will recall that in 2013 Tom Linthicum and I did consultations on Leadership Development in a couple of dioceses in ACSA, including the Diocese of Grahamstown. My PhD research emerges from that extensive research, focusing particularly on the LEARNING that undergirds clergy formation programmes in ACSA. My research QUESTION is expressed as below:

#### **Main questions**

- What *learning* in facilitation of leadership (clergy) formation takes place among different stakeholder groups in ACSA?
- What are the leadership (clergy) formation collaborative practices that can be expanded through *learning* in this context?
- How can such *learning* be expanded amongst key stakeholders?
- What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence *learning* in this context?

#### **Sub questions:**

- What types of *learning* interactions occur amongst the key facilitators of leadership (clergy) formation in ACSA?
- What do facilitators *learn* when they come together?
- How can the *learning* interactions on collaborative facilitation be expanded?
- What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive *learning* process interactions?

In view of the data that Tom and I gathered, and logistical reasons, I have chosen the Diocese of Grahamstown as one of my case studies. My analysis of what we listened to and received from our respondents in the diocese is encapsulated in the attached document. The objective is to eventually come up with what looks like a LEADERSHIP (CLERGY) FORMATION MODEL descriptive or representative of the Diocese of Grahamstown. For me to be able to reach that objective, I will need the help of those in the diocese who are hands on in leadership (clergy) formation activities/programmes. It would be very helpful and appreciated if I could meet with the individuals (as a group) at some point soon for a focused discussion based on the information which I already have – as encapsulated in the attached document.

So, to put my humble request in a sentence, I kindly ask you Reverend to assist me with identifying those of our colleagues who are assisting with the responsibility of leadership (clergy) formation in the diocese. I would then contact those individuals to work out the possibility of meeting for a focused discussion.

I am hoping to hear from you at your earliest convenience.

Sincerely yours,

Revd Percy Chinganga  
(Rhodes University PhD Scholar)  
**APPENDIX 3**

### **LETTER TO A DIOCESAN OFFICIAL (DIOCESE OF JOHANNESBURG)**

I write to ask for your help in relation to my PhD research.

I am sure you will remember the brief conversation which I had with you a month or so ago about a consultation on Leadership Development which a colleague and I did in your diocese in 2013. Your current bishop was just starting work in the office as the new bishop and he actually participated in that consultation discussion. My PhD research emerges from that extensive research, focusing particularly on the LEARNING that undergirds clergy formation programmes in ACSA. My research QUESTION is expressed as below:

#### **Main questions**

- What *learning* in facilitation of leadership (clergy) formation takes place among different stakeholder groups in ACSA?
- What are the leadership (clergy) formation collaborative practices that can be expanded through *learning* in this context?
- How can such *learning* be expanded amongst key stakeholders?
- What historical, social and culturally constituted knowledge, tensions, contradictions and practices influence *learning* in this context?

#### **Sub questions:**

- What types of *learning* interactions occur amongst the key facilitators of leadership (clergy) formation in ACSA?
- What do facilitators *learn* when they come together?
- How can the *learning* interactions on collaborative facilitation be expanded?
- What expansion tools and processes could be used in this context, given the understandings gained in and through the expansive *learning* process interactions?

In view of the data that we gathered in selected dioceses across ACSA, I have chosen the Diocese of Johannesburg as one of my case studies. My analysis of what we listened to and received from our respondents is encapsulated in the attached document. The objective is to eventually come up with what looks like a LEADERSHIP (CLERGY) FORMATION MODEL descriptive or representative of the Diocese of Johannesburg. For me to be able to reach that objective, I will need the help of those in the diocese who are hands on in leadership (clergy) formation activities/programmes. It would be very helpful and appreciated

if I could meet with the individuals (as a group) at some point soon for a focused discussion based on the information which I already have – as encapsulated in the attached document.

So, to put my humble request in a sentence, I kindly ask you Reverend to assist me with identifying those of our colleagues who are assisting with the responsibility of leadership (clergy) formation in your diocese. I would then contact those individuals to work out the possibility of meeting for a focused discussion on an agreed day.

Your bishop has given me the blessings to consult with you on this matter.

I am hoping to hear from you at your earliest convenience.

Sincerely yours,

Revd Percy Chinganga

*(Rhodes University PhD scholar)*

## APPENDIX 4

### STRUCTURED QUESTIONS FOR TRAINING FOR MINISTRY (TfM)

- (1) How long have you been a member of TfM?
- (2) From your experience and understanding, how would you summarise the work of TfM?
- (3) Over your time as a member of TfM, what has helped you to know and learn more about the group in terms of history; goals and objectives; and values?
- (4) How is TfM involved in clergy leadership formation in ACSA?
- (5) (i) What would you consider as achievements in TfM's involvement in clergy leadership formation programmes and activities in ACSA?  
  
(ii) What would you consider as challenges encountered in TfM's involvement in clergy leadership formation programmes and activities in ACSA?
- (6) (i) What do you think TfM needs to do to enhance the achievements that you mentioned in 5 (i) above?  
  
(ii) What do you think TfM needs to do to work on the challenges that you mentioned in (5) (ii) above?

*Thank you very much for your invaluable input. God bless.*

## APPENDIX 5

### STRUCTURED QUESTIONS FOR ADVISORY BOARD ON THEOLOGICAL EDUCATION (ABoTE)

- (1) How long have you been on the Advisory Board?
  
- (2) From your experience and understanding, how would you summarise the work of the Advisory Board?
  
- (3) Over your time as a member of the Board, what has helped you to know and learn more about it in terms of history; goals and objectives; and values?
  
- (4) How is the Board involved in clergy leadership formation in ACSA?
  
- (5) (i) What would you consider as achievements in the Board's involvement in clergy leadership formation programmes and activities in ACSA?  
  
(ii) What would you consider as challenges encountered in the Board's involvement in clergy leadership formation programmes and activities in ACSA?
  
- (6) (i) What do you think the Board needs to do to enhance the achievements that you mentioned in 5 (i) above?  
  
(ii) What do you think the Board needs to do to work on the challenges that you mentioned in (5) (ii) above?

*Thank you very much for your invaluable input. God bless.*

## APPENDIX 6

### STRUCTURED QUESTIONS FOR HOPE AFRICA

- (1) How long have you been working for HOPE Africa?
- (2) What are your duties at HOPE Africa?
- (3) From your experience and understanding, how would you summarise the work of HOPE Africa?
- (4) Over your time at HOPE Africa, what has helped you to know and learn more about the organisation in terms of history; Vision; Mission; goals and objectives; and values?
- (5) How is HOPE Africa involved in clergy leadership formation in ACSA?
- (6) (i) What would you consider as achievements in HOPE Africa involvement in clergy leadership formation programmes and activities in ACSA?  
  
(ii) What would you consider as challenges encountered in HOPE Africa involvement in clergy leadership formation programmes and activities in ACSA?
- (7) (i) What do you think HOPE Africa needs to do to enhance the achievements that you mentioned in 6 (i) above?  
  
(ii) What do you think HOPE Africa needs to do to work on the challenges that you mentioned in (6) (ii) above?

*Thank you very much for your invaluable input. God bless.*

## APPENDIX 7

### CLERGY LEADERSHIP FORMATION: QUESTIONS FOR COTT ALUMNI.

1. Your gender?
2. Your age range: 25 – 30    31 – 40    41 – 50    51 – 60    61 – 70    Other (highlight)
3. Your diocese?
3. When did you complete your studies at COTT?
4. What aspects of your formation at COTT do you find helpful in your ministry so far?  
Please explain.
5. Drawing from your ministerial experience so far, what do you think should be given more attention in the College formation programme? Please explain.
6. Basing on your ministerial experience so far, what do you think should be added to the College formation programme? Please explain.
7. What have you found exciting in your ministry so far about church leadership (personal and general)?
8. (i) What have you found challenging in your ministry so far about church leadership (personal and general)?  
  
(ii) How have you responded to those challenges?
9. Any other stories about church leadership to share?

*Thank you very much for your support. I will find your input very helpful. God bless.*

## APPENDIX 8

### Application of chat 2<sup>nd</sup> generation and expansive learning cycle frameworks in contextual profiling and data analysis

Data gathering methods	Alignment with CHAT 2 <sup>nd</sup> Generation Framework		Alignment with CHAT Expansive Learning Cycle Framework	Data Analysis
	Source of data	Questions asked?		
Observation	Subject, object, tool, relationship	<p>What was done? What happened?</p> <p>Why was it being done? (Quest for transformation?)</p> <p>Who did it and how?</p>	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>
	Time and space	<p>Where was the programme observed? Where did it happen? Why was it done there?</p> <p>For how long has this programme been running? When did it start? (History of programme?)</p> <p>What kind of activities take place and when?</p>	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>
Document analysis	Purpose and relationship	Did the activities observed address the purpose of the programme?	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>
	Evidence of experience	<p>What improvements have been made through the practice? [Transformation tracking]</p> <p>What are the strengths and challenges of leading/running the programme(s)? What is being done in response to challenges? How are the strengths being reinforced?</p>	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>
Interviews	Use of knowledge	<p>How do leadership formation personnel know what to do or prioritise in their programmes?</p> <p>What else do they need to know?</p>	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>
	Contradictions and uncertainties	What is enabling and constraining the programmes?	<p><b>Action 2:</b></p> <ul style="list-style-type: none"> <li>• situational analysis;</li> <li>• historical analysis;</li> <li>• actual – empirical analysis</li> </ul>	<p>Induction</p> <p>Retroduction</p>

## APPENDIX 9

### Contextual profiling data: college of the transfiguration (Cott) as an activity system in facilitation of leadership formation in ACSA.

Research design	Research goal & question	Methods used	Data gathered	Alignment with Expansive Learning Cycle Framework	Data analysis
CASE STUDY	<p><b>GOAL</b> <i>Investigate learning processes that will enable critical engagement with the current practices in the facilitation of leadership formation in ACSA.</i></p> <p><b>QUESTION</b> <i>What learning in facilitation of leadership formation takes place among Cott members?</i></p>	<p>Observation</p> <p>Interview</p> <p>Document analysis</p> <p>Focus discussion</p>	<p>Knowledge in processes and methodologies relating to the academic, spiritual, ministerial formation of ordinands through staff meetings and workshops on selected issues relating to the formation programme of the College: <b>Academic</b> – familiarisation with HEQC requirements relating to teaching methodologies and assessment strategies, academic rules and regulations drafted by the College; <b>Spiritual</b> – chapel routine activities which include worship, prayer; chapel practice where, in addition to singing practice, particular aspects of Anglican Church worship culture are explained; ordinand spiritual guidance; <b>Ministerial</b> – ordinand involvement in leading worship in Chapel and placements in parishes in Grahamstown; <b>skills development</b>: writing ordinand formation progress reports for records and their information after a given period of time, and for the attention of sending dioceses; knowledge and skills in holistic support of ordinands; collective efforts towards forging community living at Cott, which include involvement in sharing community spaces such as dining hall and Chapel; involvement in community activities such as Community Building games and activities, sporting activities, Student Interest Matters (SIM) programmes, community evenings, community outing programmes; field research and exposure visits with ordinands; collaboration with external experts in the assessment and evaluation of courses facilitated; working partnerships with the Department of Social Responsibility of the diocese of Grahamstown which has a Leadership development component; reflections or sermons shared in the Chapel; TRF – Transfiguration research forum; drawing from College operational and institutional documents such as the Vision and Mission statement of the College, College Constitution; e-mail communication involving all staff members/formators; individual research – each member has a reading day per week. Members/formators can also apply for sabbatical leave after a certain period of service; informal chatting of formators during tea or lunch break; e-mail correspondences.</p>	<p><b>Action 1- Questioning:</b> Individuals question, criticize, or reject some aspects of the accepted understandings of collaborative leadership formation practices in ACSA.</p> <p><b>Action 2:</b> Situational analysis; historical analysis; actual – empirical analysis</p>	INDUCTIVE

Research design	Research goal & Question	Methods used	374 Data gathered	Alignment with Expansive Learning Cycle Framework	Data analysis
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CASE STUDY	<p><b>GOAL</b> <i>Investigate learning processes that will enable critical engagement with the current practices in the facilitation of leadership formation in ACSA.</i></p> <p><b>QUESTION</b> <i>What learning in facilitation of leadership formation takes place among TfM members?</i></p>	<p>Observation</p> <p>Interview</p> <p>Document analysis</p> <p>Focus discussion</p>	<p>Commitment to meet once every year; use of leadership formation resources from Cott and the different dioceses represented which are discussed and debated where considered necessary; thorough preparations for consultations; invitation of guest facilitators from other contexts to present papers on selected subjects/topics; use of Anglican Communion leadership formation resources, i.e. TEAC Grids<sup>101</sup>; careful selection of subjects/topics in line with contemporary issues confronting the Church ;TfM<sup>102</sup> membership is balanced in terms of age and diocesan position of responsibility; past systems, processes and programmes in ACSA leadership formation are revisited where there is need to; use of and reference to ACSA policy documents and Canons during deliberations; individual members assigned to research on matters relating to Anglicanism in between consultations; considerable time spent in discussions on requirements for acceptance to the ordained ministry particularly as it has been observed that there is discrepancy between ACSA stipulated requirements and practice in the dioceses; protracted discussions and debates around the issue of whether uniformity in leadership programmes across ACSA is possible given the diversity that characterises ACSA in a variety of ways (socio; historical; economic); debates on what to emphasize in the consultations: challenges faced in ministry versus joys experienced; concern with current episcopal (bishops) model of leadership – “buzz” concern expressed in small/familial groups and consultation sessions; participation of members of ABoTE and Cott; allusions to structural implications on ACSA of decisions made at TfM; research done by Barney Pityana and Luke Pato (1995); Luke Pato (2001) on formation of clergy in ACSA, CPSA then: findings articulate the requirements, standards, methodological issues, contextualisation of the processes, canonical stipulations versus practice on the ground across ACSA; minutes done at the TfM consultations (2008 – 2015) indicating concerns relating to requirements, standards and methodological considerations in relation to formation of clergy in ACSA; ACSA Constitution: Canonical stipulations on Theological Education, spiritual and ministerial formation of future clergy; Cott documents relating to formation programmes (academic, spiritual and ministerial); minutes of meetings at Cott: revision of curriculum; decisions to change spiritual formation programme – changed 3 times in the period 2007 – 2015); leadership formation documents documentation from dioceses – streamlining how each dioceses organises formation programmes and processes.</p>	<p><b>Action1- Questioning:</b> Individuals question, criticize, or reject some aspects of the accepted understandings of collaborative leadership formation practices in ACSA.</p> <p><b>Action 2:</b> Situational analysis; historical analysis; actual – empirical analysis</p>	INDUCTIVE
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## APPENDIX 10

### Contextual profiling data: training for ministry (TfM) as an activity system in facilitation of leadership formation in ACSA.

## APPENDIX 11

<sup>101</sup> **TEAC** – stands for *Theological Education for the Anglican Church* which are reference grids designed to guide the Anglican Church the world over in procedures and processes of selecting people for theological education, spiritual formation and ministerial formation. In this study, the phrase *clergy leadership formation* is used to encapsulate these different facets of the process.

<sup>102</sup> **TfM** is a clergy leadership formation structure in ACSA whose participants include diocesan Deans of Studies, Theological Educators, and Ministerial Trainers. Every year in November, these participants meet at Cott to deliberate issues of common interest in theological education, spiritual formation and ministerial training, particularly reflecting on ACSA programmes and processes.

**Contextual profiling: learning interactions between inter-acting activity systems and emerging tensions/disagreements within activity systems and between inter – acting activity systems.**

RESEARCH DESIGN	RESEARCH GOAL AND QUESTION	METHODS USED	LEARNING BETWEEN INTER – ACTING ACTIVITY SYSTEMS.	EMERGING TENSIONS/DISAGREEMENTS WITHIN AND BETWEEN INTER – ACTING ACTIVITY SYSTEMS.	DATA ANALYSIS	ALIGNMENT WITH EXPANSIVE LEARNING CYCLE FRAMEWORK	DATA ANALYSIS
CASE STUDY	<p><b>GOAL</b></p> <p><i>Investigate learning processes that will enable critical engagement with the current practices in the facilitation of leadership formation in ACSA.</i></p> <p><b>QUESTION</b></p> <p><i>What are the leadership formation collaborative practices that can be expanded through learning in this context?</i></p>	<p>Observation</p> <p>Interview</p> <p>Document analysis</p>	<p><b>Between Cott and ABoTE:</b> Curriculum matters; staff research and further studies; academic standards; enforcing structured formation routine/rhythm; fostering and strengthening collaboration between Cott and dioceses in ACSA particularly where it pertains formation of future leaders and on-going formation programmes for those already service in their dioceses;</p> <p><b>Between Cott and TFM:</b> Curriculum matters – at Cott and in ACSA dioceses; ordained ministry admission requirements and standards of formation programmes in ACSA; collaboration between Cott and dioceses in ACSA; research on issues of interest relating to leadership development in ACSA; organisation and facilitation of leadership development programmes in ACSA.</p> <p><b>Between Cott and HOPE Africa:</b> facilitation of Theology and Development course at Cott; curriculum matters at Cott; taking ordinands enrolled for the theology and Development course on exposure visits in ACSA; designing and facilitating leadership development programmes</p>	<p><b>Disagreements within Cott as an activity system:</b> whether or not staff/formators should have a reading day/off day; varying understandings of the concept formation amongst formators; different understandings of what ought to be the contribution of non-ordained members of staff; different views regarding whether Cott should recommend ordination of ordinands to sending dioceses?</p> <hr/> <p><b>Disagreements within TFM as an activity system:</b> who qualifies to be a clergy person in ACSA? (Who qualifies to be ordained?); how should ACSA deal with the issue of context where it pertains leadership formation? Is the model of leadership used by most bishops in ACSA today still serving the intended function in the work and life of the Anglican Church (ACSA)? What is a relevant model of theology today which should inform leadership formation programmes and practices in ACSA?</p> <hr/> <p><b>Disagreements within HOPE Africa as an activity system:</b></p> <hr/> <p><b>Disagreements within ABoTE as an activity system:</b> What is the role of ABoTE in the life and work of ACSA, particularly where it relates leadership formation?</p> <hr/> <p><b>Disagreements between Cott and HOPE Africa as inter – acting activity systems:</b> Nature of collaboration is not clearly spelt out as it has changed in logistics and approach over the past 8 years – particularly with the change of leadership personnel at both institutions; role specifications are not clearly spelt out where it pertains exposure visits; communication and information management issues; there are some cases where HOPE Africa asks for the same information several times (in some instances this is done by the same member); finances from donor related issues – a sensitive matter particularly in relation to how the funds are managed.</p>	INDUCTIVE	<p><b>Action 2</b></p> <p>Situational analysis; historical analysis; actual – empirical analysis</p>	INDUCTIVE

		<p>in ACSA; development programmes for Cott staff; deliberation of matters relating to leadership development at Provincial synod; Synod of bishops (when invited); and other organised provincial or diocesan programmes; designing workshop materials/manuals for training purposes in ACSA</p> <p><b>Between TFM and ABoTE:</b> deliberation of admission requirements, policies and standards for ordained ministry; logistics for training on selected topics that relate to development of leaders in ACSA; marketing leadership development programmes in ACSA; promotion of research capacity in ACSA; selection of candidates for theological education, spiritual and ministerial formation in ACSA.</p> <p><b>Between HOPE Africa and TFM:</b> organisation and facilitation of leadership training programmes in dioceses; initiating and facilitating community development projects in selected communities in ACSA; collaboration with ABoTE and Cott.</p>	<hr/> <p><b>Disagreements between Cott and TFM as inter – acting activity systems:</b> who should be selected to come to Cott for theological education, spiritual and ministerial formation? What formation programmes exist at a diocesan level and do these at all effectively prepare a person for residential formation at Cott?</p> <hr/> <p><b>Disagreements between ABoTE and TFM as inter – acting activity systems:</b> who qualifies to be ordained in ACSA? What should be prioritised in the whole formation programme? Are the ACSA Constitution and Canons still binding on decision making and practice where it pertains leadership formation?</p> <hr/> <p><b>Disagreements between Cott and ABoTE as inter – acting activity systems:</b> what is the role of ABoTE? Appears ABoTE has been narrowed down to Cott patronage whereas the Canons stipulate the extensiveness of the mandate.</p>			
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## APPENDIX 12

### Document Analysis Tool

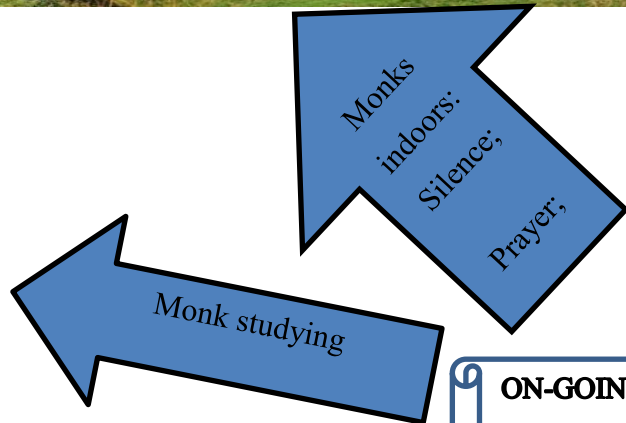
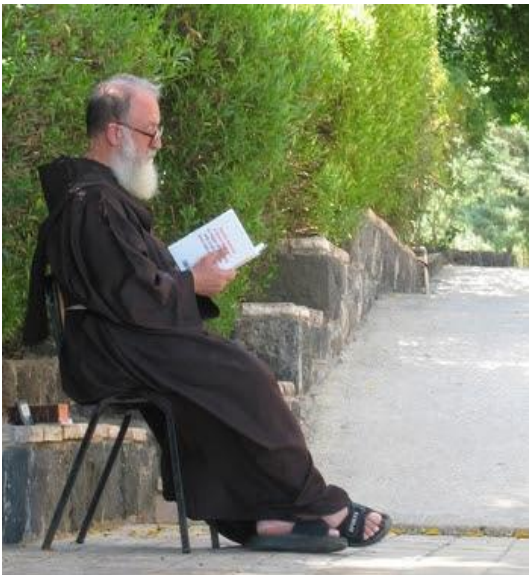
This Document Analysis Tool was designed to generate data from written documents which were accessed from the two case studies used in the study to supplement research findings gathered from interviews. I employed the inductive, abductive and retroductive inferencing methods to decipher information relating to clergy leadership formation in ACSA on the basis of historical occurrences, cultural and contextual practices. The information gathered contributed towards *Mirror data* which I used to surface contradictions in Chapter 5 and also in the facilitation of CLWs in Chapter Six.

<b>DYNAMICS OF PRACTICE (Clergy leadership formation in ACSA) FOR CASE STUDY 1 OR 2.</b>			
<b>Document</b>	<b>History</b> – Inductive inferencing ( <i>when? where?</i> )	<b>Culture</b> – Inductive referencing ( <i>what?</i> )	<b>Context</b> – inductive, abductive & retroductive inferencing ( <i>where? why?</i> )
1			
2			
3			
4			

# ANNEXURES

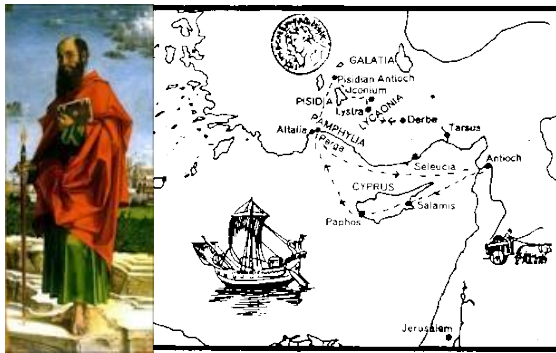
## ANNEXURE 2.1

### Illustration of monastic routine activities



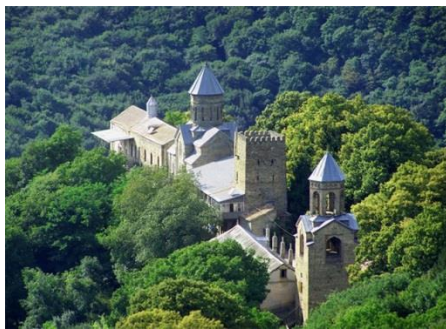
## ANNEXURE 2.2

Illustration of the flow of events in church history with an interest in Christian leadership formation



### CATECHETICAL MODEL

- Apostolic/post – apostolic periods
- Evangelism; Proclamation; Missionary work – teaching; baptising; establishment of church structures in local contexts: leadership; worship; governance; collaboration. & Post – Apostolic



### MONASTICISM

- Retreat into seclusion
- Asceticism; fasting
- Meditation, Prayer, worship
- Manual work (production)



### SCHOLASTICISM

- Interrogation of written sources
- Application of Aristotelian ideas
- Development of the intellect
- Reconciliation of faith and reason

Why the need to reform?



### RENAISSANCE/PROTESTANT REFORMATION

- Condemnation of the corruption and oppressive practices of the church
- Affirmation of the supremacy of Scripture over and above church rules.
- Affirmation of the priesthood of all

## ANNEXURE 2.3

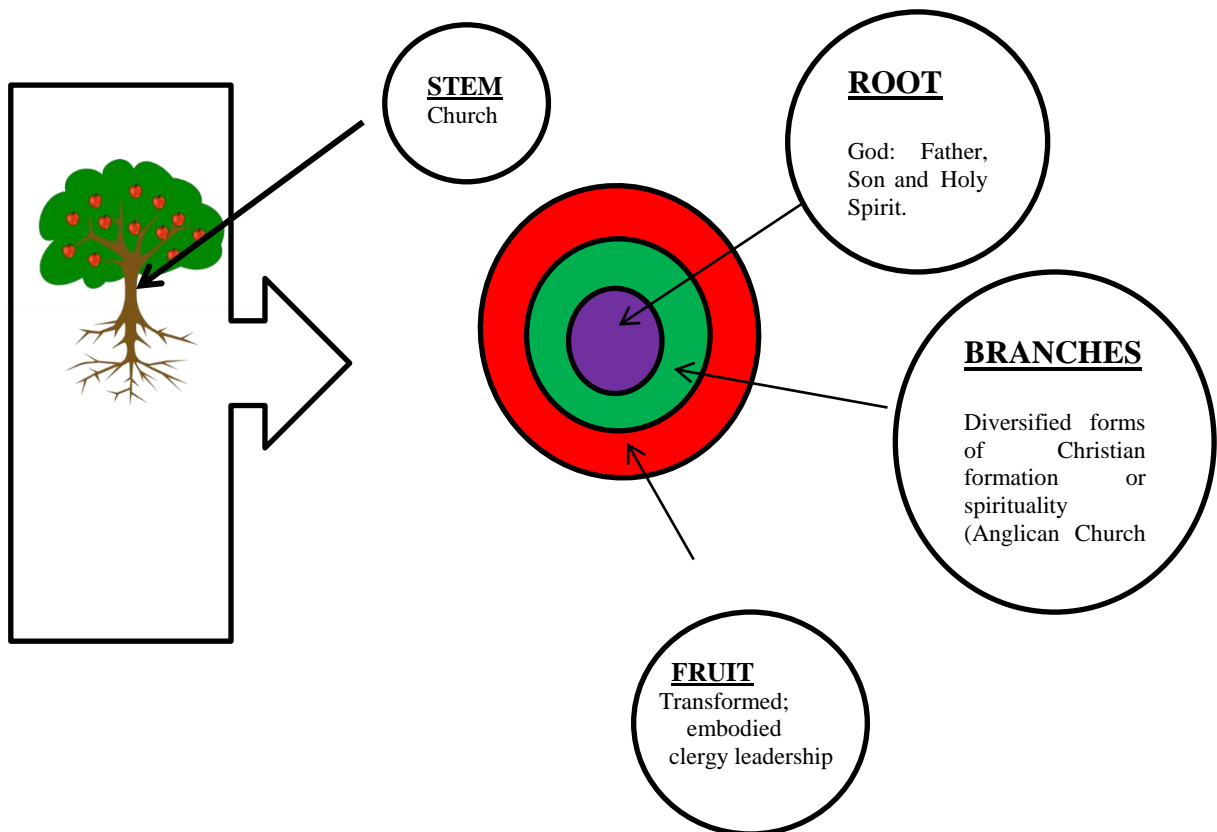
### Educational and training programmes post Protestant Reformation

Historical period	Historic event	Educational and training approaches and methodologies
16 <sup>th</sup> Century	<p><b>Protestant Reformation</b></p> <p>•Emergence of streams of Anglican spiritualities (Evangelicalism; Anglo – Catholic; Liberalism)</p>	<p>•Scholastic; academic frame work. The university was the principal learning centre. Initially, historical matters dominated theological reflections.</p> <p>•Pastoral ministry was more informed by technical knowledge of biblical languages and biblical texts than practical church experience. Seminarians graduated with diplomas and degrees. Clergy, even in rural areas, were well educated.</p> <p>•Harvard College (not seminary) was the first educational and training establishment in North America in 1636. The institution catered for all streams of Anglican spirituality, for example, Pastor theologians for Evangelicalism.</p> <p>•Preparation of practical ministry was left for years after graduation. Seminarians would be apprenticed to experienced pastors for a specified period of time before being assigned full responsibility of a parish.</p>
17 <sup>th</sup> – 19 <sup>th</sup> centuries	<p><b>The dawn of modernity</b></p> <p>•Influence of industrial and scientific developments and discoveries in England.</p> <p>•Age of Reason; Renewal (spiritual movements phenomenon)</p> <p>•Formalisation of seminary education and training.</p> <p>•Establishment of more theological</p>	<p>•The seminary approach to theological education and training came under heavy criticism particularly from Evangelicals and the Puritans who argued that it was more academic than spiritual; “learned ministry.”</p> <p>•Putting in place more solid governance, leadership and management structures in theological institutions such as funding mechanisms; professionally enabled faculty; resource facilities such as libraries; well thought through curricular and facilitation strategies and methodologies; time framed academic programmes, with the basic qualification running for a 3-year</p>

	<p>education and training institutions in England and beyond, for example Andover Theological Seminary in 1805 and Princeton Seminary in 1809.</p>	<p>duration.</p>
	<p><b>Murdock Report</b></p> <p>.Review of the performance of clergy.</p>	<p>.Quest for strategies to adequately equip clergy for practical and contextual ministry, especially the recently graduated and inexperienced clergy.</p>
	<p><b>Formation of Mission Societies, examples:</b></p> <p>.Society for Promoting Christian Knowledge (SPCK).</p> <p>.Society for the Propagation of the Gospel in Foreign Parts (SPG).</p> <p>.The problem of slavery.</p> <p>.Ecumenical relations.</p>	<p>.Training of clergy to lead in missionary work in foreign contexts with the goal of fulfilling the Great Commission mandate (Matthew 28:19 – 20).</p> <p><b>Some of the required knowledge and skills:</b></p> <p>.Proclamation (preaching)</p> <p>.Leadership and administration</p> <p>.Pastoral skills</p> <p>.Chaplaincy (mostly to fellow English people - while away from home (England)</p>

## ANNEXURE 2.4

### Basis of conceptualisation, design and facilitation of leadership formation in ACSA



*Illustration of the basis for the conceptualisation, design and facilitation of clergy leadership formation in the Anglican Church, ACSA (CPSA) in particular.*

Christian faith is founded on the person and work of Jesus (hence the central place given to Jesus in the diagram above). As such, knowledge of who Jesus is and what his ministry entails as narrated in the Bible, is foundational for Christian discipleship and clergy leadership (Nelson, 1989). It suggests that it is for this reason that leadership formation for ordained ministry in the Anglican Church, ACSA in particular, comprises theological education, spiritual nurturing and ministerial training (Moyo in Pobee & Kudadgie, 1990; Lindbeck in Astley et al, 1996).

## **ANNEXURE 3.1**

### **ACSA vision and mission statement**

#### **Vision Statement**

*The Anglican community in Southern Africa seeks to be:*

Anchored in the love of Christ,  
Committed to God's Mission,  
Transformed by the Holy Spirit.

#### **Mission Statement**

*Across the diverse countries and cultures of our region, we seek:*

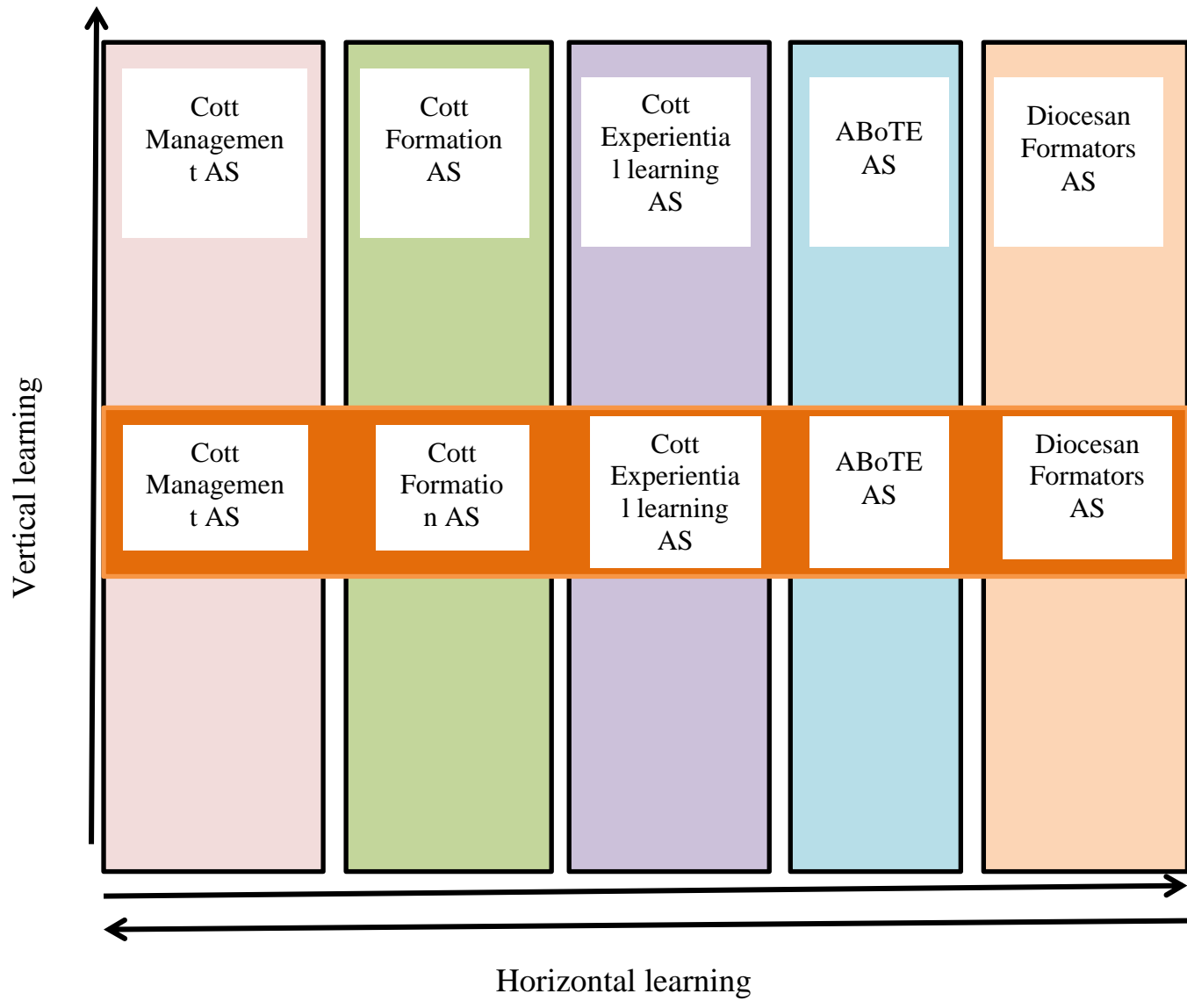
- To honour God in worship that feeds and empowers us for faithful witness and service
- To embody and proclaim the message of God's redemptive hope and healing for people and creation
- To grow communities of faith that form, inform, and transform those who follow Christ

*And, to Commit ACSA at Provincial level to the following priorities:*

- Liturgical renewal for transformative worship
- Theological education
- **Leadership formation**
- Health: HIV and AIDS, malaria and tuberculosis
- The environment
- Women and gender
- Protection and nurture of children and young people
- Public advocacy



**ANNEXURE 4.1**  
**Horizontal and vertical learning in the study**



## ANNEXURE 6.1

### Agenda for curriculum enhancement workshop

Monday	Description
8:30 – 9:00	Informal meeting with refreshments
9:00 – 10:00	What is the purpose of this?
10:00-11:00	How you 'we' conceptualise 'curriculum'?
11:00 – 11:30	QUIET CONTEMPLATION (Refreshments while perusing readings of interest that may be borrowed/shared)
11:30-1:00	How might we extend or problematize our notions of curricula?
1:00-2:00	LUNCH
2:00-3:00	What pragmatic frameworks are available for mapping curricula?
3:00-4:30	How might these enable student learning?

Tuesday	Description
8:30 – 9:00	Reflection with refreshments
9:00 – 10:00	Do we want to review/ manage/ research/ enhance curriculum through evaluation?
10:00-10:30	What pragmatic frameworks are available for formative and summative evaluation of curricula?
10:30-11:00	QUIET CONTEMPLATION (Refreshments while perusing readings of interest that may be borrowed/shared)
11:00-1:00	Workshopping valid sources and methods to inform curriculum evaluation
1:00-2:00	LUNCH
2:00-3:00	Conceptualising curriculum enhancement for COTT
3:00-4:00	Going forward

## ANNEXURE 6.2

### Cott experiential learning programme in collaboration with Hope Africa

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COTT staff who are involved in the Hope Africa facilitated student experiential learning programme (also known as Exposure Visit) met on 6 September 2017 to evaluate the programme on the basis of what was experienced of the programme in the three years that it has been running (2015; 2016; & 2017). The key issues which emerged in the evaluation discussion are summarised below:

**1. PLANNING:** To ensure accountability on the part of all concerned stakeholders, effective management, smooth-flow co-ordination and facilitation of the programme, strategic planning is of the utmost importance. It is suggested that before the end of a COTT academic year, all programme stakeholders ought to have been informed of a detailed and integrated tentative programme for the following academic year. This would entail the need for stakeholders to meet for a strategic planning meeting towards the end of each year or earlier as may be practicably possible. It was felt that telephonic and e-mail forms of correspondence on programme planning could be used to complement the deliberations which would have been done at a *sit-down* planning session.

**2. COTT NEW STATUS:** COTT was accorded a provisional registration status as a Private Higher Education Institution and a provider of an accredited Diploma in Theology academic qualification as from 2014 and Bachelor of Theology academic qualification as from 2015. This has entailed compliance with the legislation of the Department of Higher Education and Training and South African Qualifications Authority in all COTT academic, spiritual and ministerial formation programmes. Experiential learning is a critical aspect of the accredited qualifications, hence the importance of the Exposure Visit Programme which is facilitated by Hope Africa. Primarily, the Exposure Visit Programme is linked to the curriculum course *Theology and Development* (TD) and, secondarily, is a complementary programme to the broader COTT formation programme. On the basis of this background information, it is emphasised that the planning of the Experiential Programme (Exposure Visit) and TD related inputs such as workshops and teach-ins ought to be aligned with the planning and organisation of the broader COTT formation programme.

**3. PROGRAMME IMPACT ASSESSMENT:** Three forms of impact assessment of the Experiential Programme (Exposure Visit Programme) were discussed and thought to be fundamental to the evaluation of the programme:

3.1 Student assessments through de-briefing exercises during the course of the Exposure Visit Programme and individual student reflective portfolios post-programme.

3.2 Evaluation of student performance during the course of the Exposure Visit Programme by communities which the students would have interacted with.

3.3 Evaluation of student ability to implement knowledge and skills gained in own diocese even after the student would have completed studies at COTT.

It was agreed that all concerned stakeholders should be informed of the outcomes of these assessment exercises for each of the students involved.

## ANNEXURE 6.3

### THEOLOGY AND DEVELOPMENT 1

#### 5. SPECIFIC OUTCOMES & ASSESSMENT CRITERIA

Students who have completed this course should be able to:

##### **5.1 Integrate theological and pastoral learning in designated contexts of learning.**

5.1.1 Explain the interplay between theology and practice in pastoral and community engagements in a variety of contexts.

5.1.2 Recognise context as a primary determinant in work integrated learning engagements.

5.1.3 Demonstrate the implementation of theological and pastoral learning in a variety of contexts.

*Range: Pastoral leadership skills; educational pastoral care skills; expansive learning skills.*

##### **5.2 Select and implement basic tools of social analysis in response to circumstances and needs of persons in specific contexts.**

5.2.1 Identify, describe and utilise appropriate tools of social analysis in a variety of contexts.

5.2.2 Evaluate the effectiveness of the selected tools of social analysis in context.

##### **5.3 Demonstrate a reflexive approach to personal and inter-personal relationships in designated contexts of learning.**

5.3.1 Design an appropriate pastoral or community engagement programme in consultation with specific persons and communities.

5.3.2 Apply selected theories to critique a pastoral or community engagement programme with reference to a specific context.

5.3.3 Reflect critically upon the significance of the integration of theology and practice in community engagements in the Anglican Church with specific reference to southern Africa.

5.3.4 Show evidence of the ability to engage reflexively in familiar and new designated contexts of pastoral practice.

## ANNEXURE 6.4

### Parish placement supervision programme

#### ANALYSIS OF SITE VISIT FINDINGS (2017)

ANALYSIS INDICATOR	DETAILS OF FINDINGS
<p><b>PROGRAMME</b></p> <p><b>CONCEPTUALISATION</b></p>	<p>The suggestion by one of the bishops interviewed for COTT to consider splitting the BTh programme into two blocks (time at the College and time in a parish) would not align with the totality of the COTT formation programme and also what the parish placement programme is intended to add to the holistic formation of the concerned students. In another case suggesting a similar understanding, the feedback reports which were given by both the concerned student and supervisor suggested that the programme had been understood as curacy which is a different formation phase applicable to people who would have just been ordained (deacons). Basing on these two cases, it would appear that some of the key stakeholders in this programme are/were working on assumption regarding matters relating to the nature and requirements of the parish placement programme.</p> <p><b><u>SUGGESTED COTT RESPONSE:</u></b> Educate stakeholders about the BTh programme, particularly the parish placement programme, through workshops, etc. COTT Dean of Studies to lead in this arrangement, possibly with ABoTE and TFM.</p>
<p><b>PROGRAMME</b></p> <p><b>PLANNING</b></p>	<p>One of the bishops interviewed commented that the parish placement programme gives the diocese an opportunity to know more about the student(s) concerned before considerations for ordination. In another interview, a diocesan official had assessed the student placed in his responsibility incompetent in preaching, advising in his recommendations what the College should consider doing towards equipping students with the requisite preaching knowledge and skills.</p> <p><b><u>SUGGESTED COTT RESPONSE:</u></b> Enquire with dioceses on the possibilities for close working relationships between the College and the concerned dioceses towards a seamless formation programme for all students, particularly those on the BTh academic programme. For instance, would the dioceses concerned consider attaching the concerned students to parishes at the beginning or in mid-year of their 3<sup>rd</sup> year of the academic programme as a precursor for the formal parish placement programme which comes in their final year? This would give ample opportunities for collaborative partnerships between COTT and the dioceses towards assisting the concerned student(s) with focus and intentionality.</p> <ul style="list-style-type: none"> <li>• It might also be helpful for COTT to consider reviewing the current Parish Placement Programme for all students in view of the gaps in ministerial skills which are revealing through the supervised 4<sup>th</sup> year parish placement programme.</li> </ul>
	<p>Student feedback emphasised the huge load that they are subjected to which could be a result of a duplication of assessment tasks for two of the core courses, namely: <i>Research for</i></p>

<p><b>FACILITATION</b></p> <p><b>AND</b></p> <p><b>ASSESSMENT</b></p>	<p><i>Transformation (RfT); and Exploring the Anglican Way (EAW).</i></p> <p><b><u>AGREED COURSE OF ACTION:</u></b> The two concerned courses should dovetail: <i>EAW</i> should provide students with research topic options in observance of the requirements of <i>RfT</i> course.</p>
<p><b>PROGRAMME</b></p> <p><b>MANAGEMENT</b></p>	<p>Information relating to fees charged on 4<sup>th</sup> year students - how might the allocations cater for the needs of the students while on placement, away from the College? How might students be assisted with reading materials?</p>
<p><b>EVALUATION OF</b></p> <p><b>PROGRAMME</b></p> <p><b>[RECOMMENDATIONS]</b></p>	<p>Areas suggested Cott could design short courses for:</p> <ul style="list-style-type: none"> <li>• Administration; Management; Planning; Conflict management</li> </ul> <p>While these requests seem reasonable, the questions to ask are: is the need responded to of a theoretical or practical nature? How are the particular subjects (topics) requested for addressed by the Cott curriculum? How might the COTT courses which cover these subjects (topics) be adjusted or improved, if there is need to?</p> <ul style="list-style-type: none"> <li>• The answers to these questions seem to point more in the direction of the practical domain of the formation process.</li> </ul> <p>So, from where would the students benefit more on the particular issues raised – diocese or College?</p> <ul style="list-style-type: none"> <li>• What is covered in diocesan on-going formation programmes?</li> <li>• How might COTT enhance current formation practices which engage students in ways which expose them to ministerial skills development opportunities such as Formation Group; Chapel Practice; Chapel creative worship?</li> <li>• What opportunities are available for students to learn in the lacking formation aspects from parishes or churches and other communities in Grahamstown such as the monastery and the nunnery?</li> <li>• Should the focus not be more on collaboration possibilities between the College and the diocese than on giving the whole responsibility to the College?</li> <li>• These are questions that should pre-occupy ABoTE and TfM, considered particularly from the perspective of the ACSA Canons (Refer to <i>Constitution and Canons of the Anglican Church of Southern Africa, 2014, Act XIV</i>).</li> </ul>

## ANNEXURE 6.5

### MISSIOLOGY

#### 5. SPECIFIC OUTCOMES & ASSESSMENT CRITERIA

On successful completion of the course students will be able to:

##### **5.1 Demonstrate knowledge of mission as *missio dei*.**

5.1.1 Define and analyse *missio dei* on the basis of Scripture and Church practice in a variety of contexts.

5.1.2. Evaluate the practice of *missio dei* in identified contexts.

##### **5.2 Investigate Anglican Church understandings of *missio dei* in theory and practice.**

5.2.1 Identify and explain theological foundations undergirding Anglican Church practice of *missio dei* in context.

5.2.2 Describe and analyse the different models of *missio dei* as practised by the Anglican Church with particular reference to southern Africa.

5.2.3 Evaluate Anglican Church ecclesiology in contemporary practice of *missio dei*.

##### **5.3 Examine Anglican Church practice of *missio dei* in relationship with other denominations and faiths.**

5.3.1 Investigate the genesis and development of ecumenical structures relating to the practice of *missio dei*.

**Range:** SACC; AACC and WCC.

5.3.2 Describe and analyse contemporary ecumenical initiatives in the practice of *missio dei* with special focus on the role of the Church Unity Commission in Southern Africa.

5.3.3 Critique the impact of ecumenical partnerships in southern Africa in the recent history.

## ANNEXURE 6.6

### PASTORAL STUDIES 1

#### 5. SPECIFIC OUTCOMES & ASSESSMENT CRITERIA

On successful completion of the course students will be able to:

##### **5.1 Demonstrate knowledge of models of pastoral leadership appropriate to a variety of contexts.**

*Range: Models in pastoralia; counselling; church administration and management.*

5.1.1 Describe models of pastoral leadership as portrayed in Scripture and practised by the Church in response to the needs of individuals and communities in context.

5.1.2 Explain how different models of pastoral leadership may be used to affirm and nurture people in a variety of contexts.

5.1.3 Engage critically the ethical norms imperative in the practice of pastoral leadership in context.

##### **5.2 Articulate a theology of pastoral leadership fundamental to the practice of ministry in context.**

5.2.1 Research and develop a theology of pastoral leadership based on Scripture and Tradition, particularly as depicted in Jesus' relationships with others.

5.2.2 Use the foregoing to establish a model for ministry which promotes transforming relationships both between individuals and within communities in context.

5.2.3 Evaluate the influence of a theology of pastoral leadership on contemporary practice with specific reference to southern Africa.

##### **5.3 Reflect upon Anglican Church practice of pastoral leadership from the perspective of gospel values.**

5.3.1 Identify and explain Anglican Church pastoral leadership approaches and methodologies in response to the needs of communities with specific reference to southern Africa.

5.3.2 Describe and analyse aspects of transforming pastoral leadership embodied in Anglican Church ecclesiology with specific reference to southern Africa.

5.3.3 Use own experiences of Anglican Church practices to assess pastoral leadership through a contextual lens.

### **Pastoral Studies 1: Rationale for outcomes (conceptualisation)**

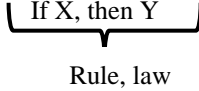
The course is a re-construction of some aspects of the current *Introduction to Pastoral Studies course* (at 2<sup>nd</sup> year) into a 1<sup>st</sup> year course which will also absorb some aspects of the current TPTC course (at 1<sup>st</sup> year) namely leadership, management and ethics. In terms of vertical alignment as per curriculum requirements, this new course will align with the work integrated course (TD 1) at 2<sup>nd</sup> year level; Missiology at 2<sup>nd</sup> year level; TD2 at 3<sup>rd</sup> year level; Pastoral Studies 2 at 3<sup>rd</sup> year level; Parish placement at 3<sup>rd</sup> year level and Christian Ethics at 3<sup>rd</sup> year level.

In a nutshell, the course teases out aspects that relate to pastoral leadership at 1<sup>st</sup> year level which would be addressed extensively later in the curriculum. Whereas the current *Introduction to Pastoral Studies course* is anchored on a *theology of encounter* in relation to the *imago dei*, the new course focuses on a *theology of pastoral leadership as portrayed in Scripture and Church practices with specific reference to the Anglican Church*.

## ANNEXURE 9.1

### Engeström (2008)'s Three layers of causality in human action

Engeström (2008) suggested “three layers of causality in human action” to represent an understanding of agency used in the study which I illustrate diagrammatically below:

<b>INTERPRETIVE LAYER</b>	In the actor.	Takes into account according to this or that logic.	
<b>CONTRADICTORY LAYER</b>	As participant in collective activities.	Is driven by contradictory motives.	Searching for resolution by often unpredictable actions.
<b>AGENTIVE LAYER</b>	As potential individual and collective agent.	Takes intentional transformative action.	Inventing and using artefacts to control the action from the outside.