TOWARD A CONTINUUM FOR JESUIT EDUCATION FOUNDED UPON CURA PERSONALIS AND MAGIS

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TOWARD A CONTINUUM FOR JESUIT EDUCATION FOUNDED UPON CURA PERSONALIS AND MAGIS

by

José Miguel Jaramillo

A Dissertation submitted to the Faculty of the Graduate School, Marquette University, in Partial Fulfillment of the Requirements for the Degree of Doctor of Philosophy in Educational Policy and Leadership

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ABSTRACT

TOWARD A CONTINUUM FOR JESUIT EDUCATION
FOUNDED UPON CURA PERSONALIS AND MAGIS

José Miguel Jaramillo
Marquette University, 2024

This dissertation examines the principles and purposes of Jesuit education, renowned for integrating academic excellence with spiritual and civic values, in search of decision-making criteria. While Jesuit schools followed the 1599 Ratio Studiorum, they now adhere to guidelines set by the International Commission for the Apostolate of Jesuit Education (ICAJE). Despite ICAJE's comprehensive framework, a gap exists in providing explicit criteria for educational decision-making beyond calling to discern.

Employing a thematic qualitative content analysis method, this research analyzes ICAJE's documents through a hermeneutic lens, drawing upon foundational Jesuit educational sources and significant contemporary studies. Key findings suggest that these principles not only encapsulate the essence of Jesuit education but also offer streamlined fundamental decision-making criteria to guide discernment.

This study articulates cura personalis (care for the individual's holistic development within the human community) and magis (discerned pursuit of the greater good) as the essential principles conveying the identity and purpose of Jesuit education. It advocates for these as fundamental decision-making criteria.

This dissertation's significance lies in its methodological blend of thematic and qualitative content analysis and its practical implications for qualitative researchers and practitioners in education. These findings can assist Ignatian educators in making more effective choices regarding didactical methods, organizing curricula, and defining institutional strategies to ensure a cohesive and enriching humanistic educational experience that better aligns with the fundamental ethos of Jesuit education. Future studies could use these criteria to advance a framework for a K-20 system of Jesuit education.
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José Miguel Jaramillo

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# TABLE OF CONTENTS

ABSTRACT......................................................................................................................................................... i

ACKNOWLEDGMENTS ........................................................................................................................................... iii

Table of Contents ................................................................................................................................................ v

List of Figures .................................................................................................................................................... viii

List of Tables ...................................................................................................................................................... ix

CHAPTER 1: INTRODUCTION .......................................................................................................................... 1

Research Focus .................................................................................................................................................... 1

Aim and Research Question ................................................................................................................................ 4

Definition of Terms ............................................................................................................................................... 5

Cur a Personalis ................................................................................................................................................... 5

Magis ................................................................................................................................................................... 10

De-limitations ................................................................................................................................................... 16

CHAPTER 2: LITERATURE REVIEW .................................................................................................................... 17

Context and Relevance of Jesuit Education ....................................................................................................... 17

Historical Development of Jesuit Education: From Ignatian Roots to Global Expansion ............................... 18

Educational Sources and Frameworks for Jesuit Education ............................................................................ 21

The Spiritual Exercises at the Roots of Jesuit Education.................................................................................... 22

Additional Foundational Documents ................................................................................................................ 24

Frameworks for Jesuit education ....................................................................................................................... 25

The Ratio Studiorum as a Foundational Framework ......................................................................................... 25

Discussions about the Need for a New Ratio? .................................................................................................. 28
Modern Framework for Jesuit Education.................................................................32
Core Principles of Jesuit Education and Role in Society........................................34
Jesuit Education in the 21st Century: Governance and Global Networking.............44
Leadership and Management .........................................................................45
Global Networks Embracing Inclusivity and Social Justice.................................46
Collaboration and Adaptation: Integrating Lay Educators and Jesuit Traditions...48
Challenges and Responses ............................................................................51
Exploring the Potential of Unified Decision-Making Criteria.............................53

CHAPTER 3: METHODOLOGY ............................................................................60
Theoretical Framework .....................................................................................60
Positionality ....................................................................................................66
Research Design ..............................................................................................71
Method ............................................................................................................71
Research Context ............................................................................................76
Data Collection ...............................................................................................79
Ethical Considerations .....................................................................................82
Data Analysis ..................................................................................................82

CHAPTER 4: RESULTS ..................................................................................88
Current Framework for Jesuit Education ..........................................................88

   The Characteristics of Jesuit Education (1986) ..............................................88

   Ignatian Pedagogy: A Practical Approach (1993) .........................................90

   Jesuit Schools: A Living Tradition in the 21st Century. An Ongoing Exercise of
   Discernment (2019) .......................................................................................92
LIST OF FIGURES

Figure 1 General Content-Analytical Procedural Model .................................................. 76
Figure 2 Step Model of Inductive Category Development ............................................. 86
Figure 3 Process Model of Inductive Category Formation ............................................ 87
Figure 4 Ignatian Pedagogical Paradigm ........................................................................ 91
Figure 5 Heatmap of Top 25 General Co-occurrences .................................................... 99
Figure 6 Heatmap of Top 25 General Co-occurrences Grouped by Themes ................. 103
Figure 7 Combined Heatmap for Top 10 Co-occurrences Within the Themes “Cura
Personalis,” “Magis,” and “Integration Cura Personalis/Magis” .................................... 108
LIST OF TABLES

Table 1 Characteristics of Jesuit Education .................................................................89

Table 2 Code System Comparative ..............................................................................101
CHAPTER 1: INTRODUCTION

The Society of Jesus (Jesuits) has significantly influenced global education, merging academic excellence with spiritual and civic values. This study traces the ongoing tradition of Jesuit education, from its early emphasis on ‘docta pietas’ and ‘vita civilis’ to its contemporary commitment to forming individuals of human excellence: conscious, competent, compassionate, and committed men and women for and with others. This historic arc includes the presentation of the core principles that guide Jesuit education, its sources, and its frameworks. The research suggests the need for simplified or fundamental criteria for decision-making to guide ongoing discernment of the living educational tradition towards a continuum of ‘cura personalis’ and ‘magis,’ an integrated educational pathway that is deeply rooted in the fundamental aspects of Jesuit education.

Research Focus

Founded in 1540, the Society of Jesus has long prioritized education as a mission or apostolate1 to respond to God’s call for service. Since 1548, Jesuit schools have

———

1 The Society of Jesus is the largest male religious Order in the Catholic Church, and its members are priests or brothers. In the Catholic Church, an apostolate is an activity that furthers the mission of the Church, such as evangelization, education, social justice, and charitable works. These can be carried out by individuals, groups of lay people, or religious orders like the Jesuits. The Jesuits have their own apostolates or specific fields of work in the world, namely: spirituality, education, higher education, social and ecological issues, media and communications, young adults, pastoral services, service of faith, ecumenical and interreligious relations, and mission for the pope. In each of them, Jesuits and companions carry out their activities and works according to the mission of the Society of Jesus as defined in the General Congregation 36: Companions in a mission of reconciliation and justice with God, within humanity, and with creation. These apostolates make concrete the Order’s Universal Apostolic Preferences (UAP) and tie the local ministries to the overall mission of the Church, entrusted to the Order by Pope Francis and directed by Fr. General, Arturo Sosa, SJ.
focused on forming people to live as respectful Christian citizens (\textit{vita civilis}) whose actions reflect their \textit{docta pietas} or worship of God and obedience to civil authorities (Ganss, 1956; O’Malley, 1995, 2000b; Scaglione, 1986). Currently, the Jesuits define the order’s educational mission as an effort to form “men and women for others and with others” (Arrupe, 1973b; ICAJE, 1986a).

Jesuit schools were once part of a global enterprise governed by the systematic pedagogical guidelines established by the \textit{Ratio Studiorum} of 1599. However, after the suppression of the Society in 1773, Jesuit schools focused rather on adaptation to reflect the unique cultural and contextual landscape of their respective locales. Instead of basing themselves on systemic guidelines, Jesuit schools are part of a living tradition that balances local pedagogical adjustments with preserving Jesuit education's roots and universal nature in diverse religious, national, cultural, and socioeconomic contexts (Andrews, 1991; ICAJE, 2019; O’Malley, 2000a). The result is one of the world’s most extensive non-governmental educational networks, providing education from preschool to graduate school, including technical and non-formal education (\textit{Interactive Map}, 2023).

This global network adheres to traditional roots and strives for creative application. For the Jesuits, education is a means for the betterment of the person in the holistic sense and, through the service to others, a mission that moves toward the transformation of the world alongside Christ’s Gospel values. “For such a school, as noted by Donohue (1963), must, in the first place, be a real school and a Christian school and its full educational theory includes all that those essential characteristics require” (p. 82). This fundamental requirement impels a rich tradition of creative orthodoxy and
orthopraxis, emphasizing innovative operation while staying true to its principles and goals, which imposes continuous reflection on the practices and principles of Jesuit education.

Without the standardized teaching methods and curriculum guidelines previously set by the *Ratio Studiorum*, the international network of Jesuit schools, like the rest of the Jesuit apostolates, requires ongoing evaluation and clarification of its educational principles and goals (cf. GC 33 (1983), decree 1, nn. 42-43)–General Congregations (GC) are the supreme legislative body of the order². As a response, collective reflection on the education apostolate’s practices and challenges led the International Commission for the Apostolate of Jesuit Education (ICAJE) to publish new guidelines to help aid the decision-making processes or discernment in Jesuit schools (ICAJE, 1986a, 1993, 2019). These publications present 28 characteristics of Jesuit education based on nine Ignatian worldviews, a pedagogical paradigm, and 10 global identifiers for Jesuit schools. All together form the current framework (Sosa, 2019b) that, alongside the Universal Apostolic Preferences 2019-2029, must guide the ongoing discernment on Jesuit education.

² A Jesuit General Congregation (GC) is a gathering of the highest governing body of the Society of Jesus. It comprises delegates from Jesuit provinces or administrative regions around the world, who come together to elect a new Superior General and discuss and make decisions on matters of importance for the Society, such as its mission, policies, and future direction. GC occur roughly every 12 to 15 years since the first one in 1558. The most recent Jesuit General Congregation, the 36th happened in 2016, during which Fr. Arturo Sosa, S.J. (born 12 November 1848) was elected as the new Superior General.
The current Jesuit educational framework aims to ensure that students attending Jesuit schools at any level of formal education receive a well-rounded education that prepares them for academic success and equips them to positively influence their communities and the world. However, using a wide range of documents and elements for decision-making could result in a convoluted reflection process that may hinder the best course of action or even lead to criteria fragmentation because of cherry-picking elements closer to the educational level being considered. To avoid such fragmentation, identifying a set of fundamental criteria could prove beneficial. By researching the core principles and goals of Jesuit education, we can not only highlight its key ideals but also advance the reflection process toward straightforward fundamental decision-making criteria, which eventually could lead to the development of a more coherent continuum based on the essential elements of Jesuit education. The goal here is to identify those fundamental criteria for decision-making.

**Aim and Research Question**

This study makes a case for establishing fundamental criteria for decision-making, which could be used to promote a deliberate continuum of Jesuit education, which operates across all levels of formal schooling in a *de facto* K-20 system. Despite the notable prestige and long-standing tradition of Jesuit education on a global scale, improvement is an essential requirement because the Ignatian perspective demands a continuous evaluation and pursuit of ‘the greater good possible.’

To collaborate in that effort of continuous enhancement, I analyze contemporary documents that shape Jesuit education, considering the fundamental sources for education in the Society of Jesus. I analyze the selected corpus produced by the ICAJE to identify
essential elements of Jesuit education in pursuit of identifying fundamental criteria for decision-making or discernment that could eventually advance a deliberate educational continuum. As a Latin-American Jesuit witness to deep social disparities, I care about justice and equal opportunity issues and want to find a normative basis to support the coherent implementation of the educational work of the Society of Jesus in all its schools. Thus, I advocate for simplified or essential criteria guiding decision-making processes in Jesuit education in the local territories. To accomplish this objective, the study focuses on the fundamental principles of Jesuit education, the purpose of Jesuit education, and the essential criteria for advancing discernment or decision-making processes based upon *cura personalis* and *magis*. This way, the *de facto* K-20 global network of Jesuit schools could maintain a consistent core of *caring for the formation of the whole person* that leads students to imagine and embrace *the greater good* in their lives.

Using Ignatian jargon, I pursue to identify fundamental criteria for decision-making or discernment along the lines of the “First Principle and Foundation” (*Spiritual Exercises* N. 23) that could safeguard and ignite the lifespan of formal humanistic education in Jesuit schools. Consequently, my research question is: Can *cura personalis* and *magis* be the fundamental decision-making criteria for Jesuit education?

**Definition of Terms**

**Cura Personalis**

*Cura personalis*, the Latin phrase meaning "care for the whole person," is a fundamental principle in Jesuit education. *Cura personalis* applied to education has its roots in Christian humanism (Doyle, 2011; Modras, 2004; O’Malley, 1990) which dates to the 16th century and is not specific to Jesuit education alone. As Geger points out,
citing Anthony McGinn, S.J., claiming that the values of “holistic education” and “respect for the individual” are exclusive to Jesuit education, would be “like trying to copyright the alphabet” (2014, p. 20). However, when this approach applies to education, combining a humanistic educational model with Ignatius of Loyola’s spirituality, cura personalis reflects a distinct philosophy and educational practices (Kolvenbach, 2007) that had been successfully implemented since the early days of Jesuit schools.

While the term itself was not in use in education until the twentieth century by the 26th Superior General of the Society of Jesus, Fr. Wladimir Ledóchowski, S.J. (1866-1943, in office 1915–42), it has roots in Ignatian spirituality, where the spiritual director tailors the Spiritual Exercises to the individual's unique talents and relationship with God (Casalini, 2021; Geger, 2014). According to Ledóchowski’s Instructions for The United States Assistancy on The Governance of Universities, Colleges, and High Schools, and on The Formation of Their Teachers (Rome, Aug. 15, 1934), achieving “the end goal of our education [which] is to lead students to the knowledge and love of God” (art. 7, n. 1), requires of “the personal care of the students by which Ours [Jesuit teachers] strive to direct and assist each one through advice and exhortation, in addition to the instruction and example provided in the schools (Personalis alumnorum cura, qua Nostri, praeter doctrinam et exemplum in scholis praestitum, singulos consilio et exhortatione dirigere et adiuvare satagant)” (art. 7, n.2 d, original Latin).

Ledóchowski, in keeping with a longstanding Jesuit tradition, emphasized that Jesuit schools should provide education that goes beyond mere instruction and contributes to the formation of the whole person for the common good. His Instructions
emphasize that the aim of Jesuit education is to lead students in the knowledge and love of God, with a foundation in loving the student as God's creation. Accordingly, Jesuit education places the student at the center, the school at his side, and God at his end. Hence, it requires educators to provide knowledge and personal testimony (doctrina et exemplum) together with personalized advice and motivation (singulos consilio et exhortatione), both tailored to the student’s needs. Moreover, cura personalis also captures the notion that Christian faith involves caring for the entire person to accompany her to grow to the fullest of her potential as a social being, or in Ledóchowski’s words, as an “outstandingly prepared person for their family, their country, and the Church” (art. 7, n. 1).

Consequently, Ledóchowski’s call for cura personalis at Jesuit schools is based on both religious and academic values and emphasizes the importance of educators being attentive to the whole person (Casalini, 2019b). However, it is necessary to avoid flat formulations that could mistakenly lead to conflating these two aspects, deflating the religious dimension and equating Ignatian cura personalis with the secular idea of "care for the development of the whole person." In line with Ignatian spirituality, specifically the “First Principle and Foundation” embodied in Ignatius’ Spiritual Exercises N. 23, the ultimate aim for each person is divine, as individuals are created to be united with God (Peters, 2022). Therefore, the care for the individual encompasses support for their spiritual growth, which is the ultimate goal of the entire Ignatian humanism that is integrated into the educational apostolate.
This conception of *cura personalis* is incarnational, i.e., it emphasizes the uniqueness of every individual, who is created in the image of God and possesses inherent dignity and worth (Peters, 2022). Hence, the principle posits that Jesuit education should concentrate on the holistic development of the individual, encompassing not only intellectual growth but also moral, spiritual, and physical aspects of one's being (Arrupe, 1973b; Geger, 2014; Kolvenbach, 1996).

The emphasis on *cura personalis* is frequently clear in how Jesuit educators give careful attention to each student's unique needs, interests, and aspirations, and in creating a curriculum that meets the diverse needs of the student body. As a result, *cura personalis* is visible in Jesuit schools and universities, where faculty and staff are urged to become acquainted with each student's individual traits and provide them with the vital help, guidance, and resources they require for reaching their full academic, moral, spiritual, and civic potential. Since personal growth is not just for personal acquisition, which would have falsified *cura personalis*, it is directed toward civic engagement and social responsibility as a reflection of striving for the greater good or *magis*.

The goal of *cura personalis* is to help students to become their best selves, and to develop the skills, knowledge, and values necessary to lead a fulfilling and meaningful life (Kolvenbach, 2007). Because it is worth noting that Jesuit education seeks not only to foster the student's personal relationship with God but also to encourage their active participation in society. Given that we all exist within a social framework, *cura personalis* also highlights that Jesuit education should be geared not just towards acquiring knowledge, but also towards promoting the person's well-being and the
common good, i.e., education “ad cura personalis et civitatis utilitatem” (Lemke Duque & Zaldívar, 2021). In this sense, cura personalis is intrinsically connected to the capacity to discern God’s will and to respond by working for the more universal good or magis.

Cura personalis has been assumed as a conceptual category that centers both the self-understanding and the educational practice of the Society of Jesus (Casalini, 2019b). Nonetheless, over time, this concept has been used to define the responsibility of Jesuit superiors to care for each individual in the community with their unique gifts, challenges, needs, and possibilities as a complement to the cura apostolica or care for the institutions towards the mission. This idea now encompasses relationships among educators, students, and professional staff in academic settings (Worcester, 2008). Ultimately, cura personalis is considered a prerequisite for the Jesuit ideal of magis, which seeks to pursue the greater glory of God through all the persons’ actions.

In summary, cura personalis is a fundamental principle in Jesuit education that emphasizes care for the whole person, encompassing intellectual, moral, spiritual, and physical aspects of one's being. The term has its roots in Ignatian spirituality and has been a distinct philosophy and educational practice in Jesuit schools since the early days. Cura personalis is incarnational, emphasizing the uniqueness of every individual who is created in the image of God and possesses inherent dignity and worth. It is based on both religious and academic values, with an emphasis on educators being attentive to the whole person. Additionally, Jesuit education seeks to encourage students' active participation in society and promote the common good. Overall, cura personalis highlights the importance of providing personalized care, guidance, and resources to help
each student reach their full potential. Therefore, from now on, *cura personalis* denotes the care for the whole formation of every individual as part of the human community.

**Magis**

*Magis* is a Latin word (Spanish *más* in Ignatius’ original writings) meaning ‘more’ or ‘greater,’ often translated as “the greater good” (Geger, 2012). It is a principle that is central to Jesuit education and Ignatian spirituality, and it refers to the idea of always striving to do more, to be more, and to give more in service to God and to others.

Ignatius uses the idea of “more” or “greater” with high frequency in varied contexts but first introduced it in the “First Principle and Foundation” of the *Spiritual Exercises*. There, it refers to the need for continuous evaluation to desire and choose the more appropriate means to an end, i.e., to discern (prayerfully decide or choose) “definitively in everything what will lead us more to the end of our creation” or “solamente deseando y eligiendo lo que más nos conduce para el fin que somos criados,” in the original text (emphasis added), which is to the "praise, reverence, and service" of God [*Spiritual Exercises* N. 23].

This concept, at the core of the Ignatian spiritual “First Principle and Foundation,” requires a more perfect (*ad majorem*) discernment or decision-making to fulfill better (*magis*) the raison d’être of individuals and institutions. For this reason, this spiritual desire for *magis* creates a sense of tension throughout the *Exercises* that sets Ignatian spirituality apart from other spiritualities and imprints a heroic special character to the apostolate of the Society of Jesus (Lowney, 2003).
Ignatius emphasizes the idea of *magis* in the *Constitutions of the Society of Jesus*, using it as a criterion for missioning Jesuits by a superior (*Constitutions*, n. 622) and as the base for the fourth vow of special obedience to the pope (*Constitutions*, n. 605). The specific criteria for *magis* displayed by Ignatius includes the greater need among people, greater expected benefit, greater obligation to specific individuals, the more widespread good, and a greater multiplying effect (*Constitutions Part VII, especially n.622-624*). Consequently, *magis* emphasizes the importance of putting love in deeds by serving others and making a positive impact on the world by working towards “the greater good” or “the more universal good” (Geger, 2012).

*Magis* could easily be misunderstood as merely meaning ‘more’ or ‘doing more.’ Rather, *magis* propels the person to pursue quality, strive for excellence, and achieve the most optimal outcome under concrete circumstances. The focus is pursuing the greater good in terms of quality and excellence, with the constant aim of bettering oneself and positively influencing the world. In this sense, *magis* is closely linked to the Ignatian principle of “finding God in all things,” which calls for recognizing God’s presence and the purpose of one’s life in every aspect of the world.

As a result, *magis* demands constant Ignatian discernment. This process of decision-making (Liebert, 2008) requires reflecting on one's own experiences, desires, and actions in light of the Gospel and the teachings of Jesus Christ (Tetlow, 2016). It helps individuals to understand their own unique talents and abilities and how they can better use them to serve others and to make a positive difference in the world, including leadership in the workplace (Lowney, 2003; Nullens, 2019; Stackman & Connor, 2016;
Tavanti, 2021; Tran & Carey, 2018). The aim of Ignatian discernment is to align one's life with God's will and seek the best path to holiness and salvation while choosing what leads toward the ultimate human purpose.

*Magis* is always contextual because it represents the Ignatian emphasis on the importance of striving for excellence in all aspects of life, but in a way that is mindful of the unique context and circumstances of each individual or situation. It is not about achieving perfection but about making a deliberate and discerning effort to do more, to be more, and to become more for the greater glory of God and the betterment of society, always considering the “circumstances of persons, times, and places,” as St. Ignatius insisted in the *Constitutions of the Society of Jesus* (*Cons*, p. 4, c.4, n. 3; c. 13, n. 2, & A; c. 14, n. 1, B.). Hence, pursuing the *magis* means striving for the better, not the individual best, as the “single best” varies by context, and imposing a unique perspective destroys what is potentially “good.”

It may be worth emphasizing that *magis* is a comparative term, not a superlative one. When a means or a particular choice becomes final and essential, we judge it to be “the best” and not just the better solution or choice for the situation at hand. Then, a particular *how* overthrows the *why* (the reasons and motivations) and the *what for* (the purpose) of the operations. For this reason, Ignatius warned the retreatant and Jesuits against making decisions guided *sub angelus lucis* or under the appearance of goodness [*Spiritual Exercises* N. 332]. Instead, he insisted on examining the roots of each choice and then re-examining how far the results deviate from the initially intended goal. In short, every choice must be aligned with the *why* and *what for* of the decision; i.e., every
decision is context-based-value-driven. Otherwise, the decision could be misleading and, therefore, wrong or even harmful.

This Ignatian concept of *magis* has its roots in the belief that there is always room for growth and improvement in every aspect of life. As such, it is at the core of the Society of Jesus’s identity and mission captured by the motto and common Ignatian expression: *Ad majorem Dei gloriam* or for the greatest glory of God (*Constitutions* #52), as Ignatius insists in this *Autobiography* (Loyola, 2001, p. 108) and in almost every other of his writings (Brou, 1952) when pertains to apostolic actions.

It is important to note that the maxim *Ad majorem Dei gloriam* has two core components. The former, *ad majorem*, refers to *magis* or permanent discernment [SE N. 23], while the latter, *Dei gloriam*, means to the glory of God in the only humanly possible sense, which could be interpreted as the fully alive person—*Gloria Dei homo vivens*, in the words of St. Irenaeus of Lyon (*Adversus Haereses*, IV.20.7). From a Jesuit/Ignatian perspective, *homo vivens* refers to holiness and humanism, which are mutually dependent. Therefore, practicing *magis* is not only about striving for excellence and making discerning choices, but also about achieving holiness and becoming fully alive as human beings, all for the greater glory of God. In this sense, *magis* encourages individuals to strive for excellence, to go above and beyond, and to continuously better themselves while remaining open to God (Rahner, 1971) as humans, who, as beings created in the image of God (Genesis 1:27), are expected to do so.

Ultimately, the goal is to foster the fully alive human being, which is the result of the humanistic formation of the whole person, nurtured to their best possible
development and encouraged to live as fully human being (Ganss, 1956; Geger, 2014; Irenaeus, 2008; Modras, 2004). In summary, *magis* in education requires that educators continually discern how to work for “the more universal good” (Geger, 2012) as an expression of an Ignatian humanism that seeks “the greater glory of God” by choosing all means humanly possible (Modras, 2004) to support students better in the fulfillment of their potential as transcendent social beings.

In Jesuit education and Ignatian spirituality, *magis* entails a relentless pursuit of what truly matters and has greater value, namely discerning the will of God or making careful distinctions and judgments about what is most important and meaningful (Astorga, 2005). As such, it demands a constant pursuit of excellence, discernment, and going beyond what is expected, pushing oneself to reach one's full potential in alignment with God's will.

At the school, *magis* implies that the person should always look for ways to challenge herself to learn more, do more, and be more. It calls for a never-ending pursuit of excellence. Always pushing students and educators to achieve their full potential. *Magis* is a call to strive for the highest level of excellence in all areas of their lives, academically, morally, spiritually, and civically. *Magis* encourages individuals to strive for excellence in service to others, practicing justice, and is embedded in the Ignatian Pedagogy (Martins, 2003). The goal is ‘to be more to serve better’ or ‘ser más para servir major,’ as it is the motto of many Jesuit schools in the Hispanic world.

Consequently, *magis* implies discernment to carefully decide what kind of education is best for oneself and for others, to prioritize the goals, to evaluate the
resources, and to make the best use of them. The result of such a discernment serves educators as a guide to evaluate their own teaching methods and to make necessary adjustments to serve the students better without being distracted sub angelus lucis or for the appearances of immediate goodness.

Finally, magis is closely linked to the principle of cura personalis, which involves tailoring education to meet the individual needs of each student. This involves choosing all means humanly possible to support students better in fulfilling their potential as transcendent social beings. Magis calls to always seek ways to improve one’s authenticity and coherence with personal and communal faith and values, which implies the integration of knowledge and faith (docta pietas) in one's approach to civic life and the world (vita civilis).

In summary, magis is a concept that emphasizes doing what is most essential, meaningful, and beneficial in a particular context. It involves discernment, which helps individuals make wise choices and prioritize actions based on what is truly important. Magis involves choosing to act in a way that brings the greatest benefit to others rather than solely for one's personal gain. It aims to shape individuals to become more loving, compassionate, just, committed to the common good, and open to God's guidance. In essence, magis is the pursuit of doing more for others, for God's glory, and for humanity's greater good. To achieve this, discernment is essential. From now on, magis will denote the discerned pursuit of the greater good.
De-limitations

I limited this study to identifying the fundamental discernment criteria primarily from the contemporary official educational documents of the Society of Jesus read hermeneutically amid the foundational sources of Jesuit education. The goal is to use thematic qualitative content analysis to uncover the underlying principles of cura personalis and magis as the fundamental criteria for discernment or decision-making in Jesuit education present in the publications of ICAJE (1986, 1993, 2019). These make up the current framework for Jesuit schools providing detailed characteristics of what Jesuit education ought to be, the Ignatian pedagogical paradigm based upon the Spiritual Exercises of Saint Ignatius of Loyola, and global indicators for Jesuit schools today.

For future research, I wish to examine how these elements of cura personalis and magis are expressed in a K-20 framework and how such a framework influences the development and implementation of policies for a more coherent and cohesive educational continuum in the diverse contexts in which Jesuit institutions operate, focusing on educating the whole person and promoting the more universal good.
CHAPTER 2: LITERATURE REVIEW

Jesuit education has a long tradition of combining academic excellence, moral integrity, and a dedication to justice based on Christian values. This literature review aims to shed light on the case for establishing fundamental decision-making criteria in Jesuit education, rooted in the principles of 'cura personalis' and 'magis.' These two elements are the cornerstone of Jesuit education for promoting students’ holistic personal care and accompanying them to strive for excellence in every endeavor, pursuing the greater good or the betterment of all. It requires situating them in the historical context and evolution of Jesuit education and its current challenges.

Context and Relevance of Jesuit Education

Though Jesuit schools have grown rapidly worldwide, their educational approach isn't entirely new, a *creatio ex nihilo*. Jesuit education results from the adaptation of existing educational materials, methods, and educational philosophies (O’Malley, 1995; Schwickerath, 1904). The ongoing *living tradition* of Jesuit education (Sosa, 2019b) embodies the Society of Jesus' dedication to a humanistic-Christian ideal that stems from Saint Ignatius of Loyola's spiritual journey and the cultural, social, and religious dynamics of the Renaissance and Reformation periods (Kolvenbach, 1993; O’Malley, 1990, 1995). This approach combines intellectual rigor, moral virtue, and a commitment to justice in education (O’Malley, 2000a, 2015). The Jesuits first implemented this educational model in Messina in 1548 and continue to do so in the 21st century by utilizing all available resources and advancements in education (Mesa, 2013).
The Jesuits emphasize both the practicality and utility of education. According to Fr. Kolvenbach, the true measure of success in Jesuit schools is not just the acquisition of knowledge but the impact of that knowledge in actions and deeds: “What will our students do with the empowerment which is their education?” (1993, p. 4, emphasis in original). This focus on personal and societal development is at the core of Jesuit education, which seeks to blend the care for the whole person with practical outcomes that serve the greater good, i.e., to educate “ad cura personalis et civitatis utilitatem” (Lemke Duque & Zaldívar, 2021). Thus, Jesuit education strives to provide a holistic education that benefits both the individual and society.

Improving individuals and society involves critical reflection to discern not just right from wrong, but the better choice. Since founding their first school in Messina, Jesuits have emphasized discernment and efficient service in education, striving for 'the more universal good' (Geger, 2012). This approach integrates Italian Renaissance humanism with Christian values and Ignatian spirituality (O’Malley, 1990; Scaglione, 1986). This enduring effort persists in contemporary Jesuit education (Cosacchi, 2019; Kolvenbach, 2000; Rausch, 2010). Hence, by integrating intellectual rigor with spiritual and ethical dimensions, Jesuit education stands out as a model that not only educates the mind but also nurtures the whole person, preparing students for societal leadership and global citizenship (ICAJE, 2019).

**Historical Development of Jesuit Education: From Ignatian Roots to Global Expansion**

Jesuit education's relevance, deeply intertwined with its unique blend of intellectual rigor and moral virtue, leads us to explore its historical roots. Delving into its
historical development, from its foundations in Messina to its global reach, is essential to fully grasp the depth of its enduring principles and their evolution over time.

Initially, education wasn't the Society of Jesus's main apostolic focus in 1540. Yet, recognizing its importance, the Jesuits promptly prioritized youth education (Leturia, 1940). Ignatius and the original Jesuits, all University of Paris alumni, established Jesuit formation houses for new, often younger recruits requiring additional education. These Jesuits in formation or scholastics lived in these houses while attending nearby universities, as the houses lacked attached schools. Two years later, by 1542, Jesuit colleges or students’ residences started to sprout in the major Italian cities of Rome, Padua, and Bologna, plus Alcalá de Henares, Coimbra, Cologne, Lisbon, Leuven, Paris, and Valencia in the rest of Europe (Grendler, 2019).

In the 1540s, the Jesuits established or participated in founding three schools to educate non-Jesuit local students. The first two schools were mere collaborations, while the third was a Jesuit foundation. In 1541, the Portuguese authorities created a school in Goa to educate boys for the priesthood, which the Jesuits took control of in 1548 after providing some teachers in 1543. In 1545, the city of Gandía, Spain, invited the Jesuits to establish a college and school, but the school only had a few Jesuits and scholastics teaching to the sons of converted Muslims. The patron, Francisco de Borja (later Saint Francis Borgia), became a Jesuit in 1548, and the school declined considerably after that. However, the school in Messina is widely recognized as the true beginning of Jesuit education. The city invited Ignatius to start a school for boys not aspiring to clergy. He accepted this invitation on January 14, 1548. And the school in Messina became the model for all subsequent Jesuit schools in Europe. It even framed the codification of
education by Ignatius in *Part IV of the Constitutions of the Society of Jesus*, finished mainly by 1552 (Friedrich & Dillon, 2022; Grendler, 2019; O’Malley, 1995).

After founding the first school in Messina, Jesuit education flourished. By 1556, at Saint Ignatius's death, the Society of Jesus had 35 schools across Belgium, France, Spain, Portugal, and Italy, including the Roman College (1551), the future Gregorian University in Rome. The Jesuit presence expanded to 1,000 members across Europe, Asia, and South America. In 25 years, Jesuit schools grew from 35 to 144, nearing 400 by century's end, and reaching 612 by 1710. By 1773, when Pope Clement XIV suppressed the Society of Jesus, it had expanded to 20,000 members and over 800 free educational institutions. These institutions, primarily in Europe, enrolled boys from all social classes, with special attention to providing access to intelligent schoolboys from the middle and lower classes (Grendler, 2019).

Despite the universal suppression of the Society of Jesus, in regions under non-Catholic rulers, the Jesuits continued their operations uninterrupted. Catherine the Great, the Tsarina of the Russian Empire, refused to allow the publication of the papal document of suppression in her territories and enabled the Jesuits to continue running schools and recruiting new members. The Jesuits also prospered under the House of Hanover in Britain and its empire despite their struggles under the Tudors and Stuarts (Worcester, 2014b).

After the period of suppression that saw the closure of many Jesuit educational institutions and the seizure of their assets by the new nation-states, the Jesuits were re-established in 1814 mainly to continue playing a vital role in Catholic education (O’Malley, 2014; Whitehead, 2014; Worcester, 2014a). Throughout that century, more
Jesuits engaged in teaching, and the following century saw new middle and high schools emerge, fostered by increased help from lay teachers, thereby expanding their student outreach (Codina, 1999).

The sprout of Jesuit education with lay teachers and Jesuits working together can be traceable, but before the 1940s, comparing their ratios is challenging due to inconsistent data methods (Codina, 1999). However, by 1937, 4,265 Jesuits and 7,433 laypeople were educating over 204,000 students. In 1947, those numbers grew to 5,591 Jesuits, 20,714 lay people, and 257,396 students. By 1957, Jesuit schools employed 11,200 Jesuits and 31,100 laypeople and served 791,100 students. In the second half of the century, the number of Jesuits in schools rapidly decreased as lay teachers increased. By 1998, the Jesuit educational network encompassed 1,611 institutions in 73 countries, staffed by 4,561 Jesuits and 73,750 lay workers, educating 1.58 million students. Despite fewer Jesuits in schools, these institutions are notably large compared to other Jesuit apostolates. As of the beginning of the 21st century, around 5.8% of Jesuits were in schools, while 94.2% were lay people (Codina, 2000). As of 2023, the Jesuit Global Network comprises over 2,500 primary and secondary schools, plus 175 higher education institutions, collectively educating over 1.6 million students globally (Interactive Map, 2023).

**Educational Sources and Frameworks for Jesuit Education**

Having sketched the origins and expansion of Jesuit education, let us now pivot to the educational sources and frameworks that underpin this endeavor. This exploration will unveil how the *Spiritual Exercises* of Ignatius and the *Ratio Studiorum* of 1599 have been instrumental in shaping the Jesuit approach to education, combining spiritual
formation with academic rigor for a humanist education in the modern age (Storck, 2016).

The Spiritual Exercises at the Roots of Jesuit Education

Scholarly work on Jesuit education's principles is extensive. Researchers have examined St. Ignatius' ingenuity (Fitzpatrick, 1933a; Hughes, 1892), the origins and characteristics of the Ratio Studiorum (J. P. Donnelly, 2003; Farrel, 1970; Fitzpatrick, 1933b; O’Malley, 2000a; Pavur, 2019, 2021c), and the educational system itself with its contemporary challenges (F. P. Donnelly, 1934; Kainulainen, 2018; McGucken, 1932; Schwickerath, 1904; Traub, 2008). Still, others have explored the connections between Jesuit education and Ignatian spirituality, particularly the Spiritual Exercises of St. Ignatius (McGovern, 1988; Newton, 1977; O’Malley et al., 1990; O’Malley, 2015, 2021b).

O’Brien (2015), in line with McGovern (1988), defends that Jesuit education transcends the Ratio Studiorum while remaining deeply rooted in the Spiritual Exercises of Ignatius of Loyola. The Spiritual Exercises (SE) comprise a collection of meditations, prayers, and reflections that were designed to aid individuals in developing a stronger connection with God and themselves to discern how to live better as persons of faith in their professional and personal living conditions (Haight, 2010). This theological journey is marked by the exploration and education of desires (García Domínguez, 2000) meant to help the person—as its title says—“conquer oneself and regulate one’s life without determining oneself through any tendency [desire] that is a disordered experience” (SE N. 21).
Central to Ignatian spirituality and Jesuit education is the 'First Principle and Foundation' (SE N. 23), that emphasizes the significance of discernment and freedom to strive for the ultimate goal of human existence, which is to praise, reverence, and serve God. This goal is not only applicable to individuals' spiritual lives, but it also defines the purpose of Jesuit education. Hence, Jesuit education has always sought to accompany students to become individuals who are intellectually competent, spiritually grounded, academically competent, and committed to a life of service to others.

Echoing Newton (1977), Jesuit education is framed as an apostolic tool, grounded in Ignatius of Loyola's spiritual experience. As the Spiritual Exercises’ annotations suggest, in a parallel path, it is possible to identify that the educational process has a logical structure with specific objectives and evaluation procedures but also allows for flexibility and the adaptation necessary to accommodate each learner—or scaffolding from a constructivist approach, in order to assist the student in achieving the next level (Vygotsky, 1978). Teachers guide students towards self-activity and discovery, serving as experienced mentors and observers. And in addressing individual needs, teachers use diverse techniques and learning exercises. The emphasis is on the personal appropriation of knowledge and values, delving deep rather than superficially grasping a multitude of ideas because “it is not the abundance of the knowledge, but the interior feeling and taste [experience, in educational terms] of the things, which is accustomed to satisfy the desire of the soul” (SE N. 2).

Furthermore, from the beginning, like the Spiritual Exercises, schools and colleges were not intended to be the end goal by themselves, but rather tools to aid students in growing in knowledge, love, and service to God and others, which Geger
(2012) identifies as 'magis' the 'more universal good.' This pragmatic and apostolic purpose constitutes the ultimate measure of success or failure for a Jesuit educational institution. At Jesuit schools, the primary learning goal is to cultivate independence and responsibility, fostering self-driven learners, achieved through a systematic organization of progressive objectives that promotes organic growth or *cura personalis*.

**Additional Foundational Documents**

Two authors notably analyzed the convergence between *Part Four of the Society of Jesus Constitutions*, the *Spiritual Exercises* of St. Ignatius, and the process of redacting the *Ratio Studiorum* of 1599. George Ganss (1956) pioneered the return to the foundational sources to convey St. Ignatius’s idea of higher education, and John W. Donohue (1963) did the same for secondary education. From those foundations, they articulated prospective conceptualizations of the perennial values of Jesuit education, drawing on the principles guiding the Society of Jesus educational documents in light of the "First Principle and Foundation" (*Spiritual Exercises* N. 23). Ganss (1956) insisted on an education that fosters wisdom and charity and Donohue (1963) emphasized the need for schooling as a minister of the over-arching aim of loving God and loving humankind.

Jesuit education is fundamentally rooted in the *Spiritual Exercises*—specifically in the “First Principle and Foundation” [N. 23]. Hence, the *Spiritual Exercises*, serve as the cornerstone of Jesuit education and contain the foundation or the rationale for every Jesuit apostolate. *Part IV of the Constitutions of the Society of Jesus* presents the scope and purpose of Jesuit education and outlines its boundaries. Additionally, it mandated an additional document to regulate how Jesuit schools must put Jesuit education into
practice, namely the *Ratio Studiorum* of 1599 (Duminuco, 2000b; Fitzpatrick, 1933b; Padberg, 2021).

Although the *Constitutions* and the *Ratio* touch upon numerous aspects of Jesuit education, they are primarily focused on outlining practical strategies and protocols, rather than articulating explicit values or principles. It is the *Spiritual Exercises* that imbue these pragmatic educational documents with a sense of purpose and, through the transformative experiences they facilitate, establish a framework of core values (Newton, 1977).

**Frameworks for Jesuit education**

Together, the *Spiritual Exercises, Part IV of the Constitutions* of the Society of Jesus, and the *Ratio Studiorum* of 1599 form a triad that constitutes the foundational source for understanding Jesuit education (Casalini, 2019a; Casalini & Pavur, 2016; Donohue, 1963; Duminuco, 2000b; Fitzpatrick, 1933a; Ganss, 1956; Go, 2000; McGovern, 1988; Mesa, 2017; Modras, 2004; O’Malley, 1995, 2015; Padberg, 2021; Pavur, 2019; Schwickerath, 1904). Nonetheless, the *Ratio Studiorum* stands out also as the foundational framework for Jesuit education that guided Jesuit schools for centuries.

**The Ratio Studiorum as a Foundational Framework**

The *Ratio atque Institutio Studiorum Societatis Jesu* has been the bedrock of Jesuit education since its establishment by the Fifth General Congregation in 1599 (O’Malley, 2006). Issued a set of 30 regulations for administrators, teachers, and students, the *Ratio Studiorum*, or simply the *Ratio*, prescribed government, curricula, and teaching methods for Jesuit schools worldwide (Farrell, 1938; Fuerst, 1925; McGucken, 1932). While not a comprehensive treatise on educational theory, it has effectively guided
specific pedagogical practices in Jesuit schools globally, mirroring the fundamental principles found in the *Spiritual Exercises* of Saint Ignatius. Developed through collective experiences of Jesuit educators between 1568 and 1599, the *Ratio* outlined a curriculum spanning grammar, literature, philosophy, and theology, providing a structured and collaborative educational model with a clear hierarchy of authority and stages of learning (Farrel, 1970; Farrell, 1938; Fitzpatrick, 1933c; Padberg, 2021).

A brief analysis of the *Ratio Studiorum*, following Pavur (2019), lets us recognize several defining features. Firstly, it structured content outlining roles, responsibilities, and collaborative goals. Secondly, authority is employed to achieve these goals, with an emphasis on teaching respect for proper authority, particularly at the earlier levels. Thirdly, it is divided into three stages, from grammar advancing to philosophy and culminating with theology. Fourthly, oversight is integral to ensuring quality education, with Provincials creating rules to get optimal results. Fifthly, the *Ratio* supports the ultimate aim of teaching, which is to direct students toward the love of God, morality, and good citizenship. Finally, brevity and clarity are preferred over-wordiness and sloppiness.

Per the *Ratio*, Jesuit schools had lower and upper divisions. The lower schools focused on humanistic studies. It comprised five classes in Latin grammar, the humanities, and rhetoric based on the ancient Latin and Greek classics. The most popular texts in these classes were Cicero's writings. The upper school curriculum, which was found in the larger colleges, consisted of classes in logic, natural philosophy, and metaphysics, based on Aristotle's works, and mathematics, with Euclid and an array of
other authors taught. Finally, two classes of scholastic theology, based on Thomas Aquinas's *Summa Theologica*, completed the curriculum (Casalini, 2019a).

Importantly, despite its copious rules, the *Ratio* was not a rigid document but allowed adaptations to local cultures and contexts, ensuring that the Jesuit principle of respect for local customs was maintained alongside the fundamental educational values (Casalini, 2019a). Until its suppression in 1773, the Society of Jesus globally adhered to the *Ratio* for 200 years as the primary curriculum framework and significantly impacted education during the Counter-Reformation and the Age of Enlightenment (Blum, 2012; O’Malley, 1982, 2021a; Scaglione, 1986).

Post-1814 changes in the political landscape, particularly the rise of nation-states nationalizing education for national identity (Heater, 2004), posed challenges to the *Ratio*’s applicability, leading to its diminished use and the eventual need for a new educational framework (Codina, 2000; Duminuco, 2000b). After the restoration, Jesuit schools could not recover their endowments and became fundamentally private institutions with differentiated tuition, neither necessarily free nor organized under the *Ratio Studiorum* (Codina, 2000; Donohue, 1963; Ganss, 1956; O’Malley, 2000a). In 1832, 25th Father Superior General Jan Philipp Roothaan, S.J. (1785-1853, in-office 1829-53) attempted to update the *Ratio* of 1599, aiming to differentiate content and teaching methods while reasserting the humanistic values of Jesuit education for the formation of upright character “because—in his words—it forms good citizens for the sake of the commonwealth” (Casalini, 2019a). However, the proposed changes were not fully implemented (Klein, 2002). As a result, no new *Ratio Studiorum* was developed.
In 1906, the 25th General Congregation, decree 12, deemed a new *Ratio Studiorum* impractical, emphasizing instead the need for Jesuit schools to adapt to their respective national contexts. The decree resisted mandating a new edition of the *Ratio*, leaving unresolved tensions over the need for an updated curriculum framework. Thus, the old *Ratio*, though never formally abolished, continued to hold unofficial prescriptive value until at least 1957 (Casalini, 2019a; Pavur, 2019). Nonetheless, responding to local educational needs, Jesuit education had moved away from the general guidelines of the *Ratio Studiorum* of 1599 (Ahmadian, 2014; Fuerst, 1925). Even though the official *Ratio* is no longer fully in use, its principles and values continue to shape Jesuit education, and it is considered a model and inspiration for Jesuit education today (Pavur, 2019, 2021c).

**Discussions about the Need for a New Ratio?**

The contemporary debate about the *Ratio Studiorum* of 1599 centers on its relevance and potential adaptation to modern Jesuit education. It is a discussion that touches on the core elements of Jesuit education and aims to revitalize this apostolate in the 21st Century.

Pavur (2019, 2021d, 2021c, 2021b, 2021a) strongly advocates for revitalizing the *Ratio Studiorum*. He extends the significance of the *Ratio* beyond educational guidelines, viewing it as foundational to the Society of Jesus itself (2021a). Pavur (2019) takes a double position in the debate. He first presents a compelling argument that the *Ratio* takes precedence over Ignatian spirituality in the context of Jesuit education. While the *Spiritual Exercises* and *Constitutions* lay out the foundational principles and ethos, it is the *Ratio Studiorum* of 1599—he argues—which concretely develops these into practical rules for daily school operations.
Additionally, Pavur (2019, 2021b) contends that order and method are insufficient because, as Hirsch (2016) and Tate (2017) assert, culturally relevant content knowledge is critical for any educational success. Pavur advocates for a classical liberal arts curriculum that includes specific content such as Latin and Greek and ‘the great authors.’ He suggests a "countercultural reformulation" of the Ratio fitting for contemporary times (2021c). He argues that the Society of Jesus may attempt, even to a limited extent, to articulate “a new Jesuit College Core,” supported by the yet-to-be-formed Jesuit Core Board, which would create a curriculum that “offers a special academic community experience, a particular understanding of the traditions of Christian humanism and 'learned devotion' (docta pietas)” (Pavur, 2021d, p. 4). Pavur concisely states: “Jesuit education is the Ratio Studiorum, rightly adapted” (Pavur, 2019, p. 128).

However, it is important to recognize two observations to Pavur’s double position. Firstly, despite Pavur’s zeal, his extrapolation of education as the seal of the identity of the Society of Jesus blurs the lines of formal education and makes one dimension and one apostolic branch the overarching mission of the Society of Jesus. While schooling is at the heart of the Society of Jesus, its mission extends beyond it to include preaching, informal education, missionary testimony, and service through a wide range of apostolic works. Secondly, criticizing the Spiritual Exercises for not explicitly covering curricular matters is somewhat misplaced, as their purpose was never to serve as a detailed educational guide, unlike the Ratio Studiorum.

Opponents, like O’Malley (2000) and Jenny Go—the first layperson to serve as Executive Secretary of the East Asia and Oceania Jesuit Education Conference—regard the original Ratio as a historical artifact. Go (2000) qualifies the Ratio Studiorum as a
locked-away diamond ring because it no longer fits our fingers. They argue that Jesuit education should focus more on Ignatian spirituality and adapt to current educational trends and challenges without being tied to a specific, centralized curriculum.

Occupying a middle-ground, scholars like O’Malley (2015, 2021b), McGovern (1988), and Modras (2004) acknowledge the Ratio’s historical importance but advocate for contemporary educational approaches that are flexible and culturally responsive. Additionally, they consider that the core of Jesuit education lies in Ignatian spirituality, which includes Ignatius’ own educational experience, and the Spiritual Exercises. To which Donohue (1963) and Ganss (1956) added Part IV of the Society of Jesus Constitutions. All of them give prevalence to those sources over the Ratio Studiorum while advocating for flexible, contemporary educational approaches, allowing for adaptation to various cultural and educational settings.

In this perspective some scholars argue that the flexibility and innovative pedagogical approaches found in the Ratio Studiorum are crucial to understanding and operating Jesuit schools (Casalini, 2019a; Duminuco, 2000a; ICAJE, 1986b, 1993, 2019; Mesa, 2013). They see the Ratio as a living document that should have evolved alongside educational paradigms. Vincent Duminuco, S.J.—former Secretary of Education for the Society of Jesus (in-office 1986-1996)—even considers that a new Ratio Studiorum for the 21st century has already been drafted in the ICAJE’s publications The Characteristics of Jesuit Education (1986) and Ignatian Pedagogy: A Practical Approach (1993). Nevertheless, he still hoped that a new Ratio as a worldwide curriculum could be developed (Duminuco, 2000a). Currently, the emphasis is on the Jesuit method/style and purpose of teaching (Garanzini & Baur, 2022; ICAJE, 1993; Kolvenbach, 1993; Mesa,
2013; Streetman, 2015). Content, after all, depends on the needs of time, places, and persons. The consensus seems to be that Jesuit education's core lies not in a specific curriculum but in the underlying Ignatian spirituality and values of its educational practices.

Modern social challenges and diversity demand updated guidelines and focus. The complexities of education today exceed the challenges faced by the Ratio Studiorum in 1599, the adaptation attempted in 1832, and any other attempts to establish a universal set of curricular and methodological rules for all Jesuit schools. Today's educational landscape is marked by diversity in culture, language, socio-economic contexts, and legal frameworks. This complexity makes a standardized system like the original Ratio impractical for global Jesuit education since any global initiative might be rooted in the local context (Mihr, 2022).

The Society of Jesus, recognizing these challenges, has not pursued a new version of the Ratio. Instead, it emphasizes the underlying principles of Jesuit education - why, how, and for what purpose students might engage in learning. Instead, the Society of Jesus has issued updated guidelines from ICAJE (1986, 1993, 2019), that, in conjunction with the Universal Apostolic Preferences (2017-2027) reinforce the focus on adapting to places, times, and peoples. However, despite the emphasis on the local context, the Jesuits intend to ignite further global collaboration among themselves and laypeople in the missio Dei, or God's mission, in the reconciliation of all things in Christ (Col 1, 20), as it is stated in De Statu Societatis Iesu – 2023 (Sosa, 2023).
Modern Framework for Jesuit Education

The importance of the *Ratio Studiorum* of 1599 is indubitable. However, the Society of Jesus, steeped in a rich tradition of educational excellence, continues to evolve its pedagogical approach through an extensive array of theoretical documentation. This corpus of work, which includes directives and insights from Superiors General and Education Secretariats, addresses the current multifaceted operational aspects of Jesuit schools. Significantly, the contemporary framework for Jesuit education elaborated by ICAJE represents the current evolution of Jesuit educational thought and practice (Sosa, 2019b) that, together with the Universal Apostolic Preferences, might guide the educational apostolate.

The genesis of this contemporary educational framework can be traced back to the establishment of the International Commission for the Apostolate of Jesuit Education (ICAJE) in 1980 by the 28th Superior General Pedro Arrupe, S.J. (1907-1991, in-office 1965-1983). Initially, ICAJE took on the task of addressing the broad scope of Jesuit education. However, over time, it narrowed its focus, particularly to secondary education, under the Secretariat for Secondary and Pre-secondary Education. This commission has been instrumental in issuing pivotal guidelines that have shaped the direction of Jesuit education in recent times.

Ongoing Exercise of Discernment (2019) continues this tradition, reflecting the dynamic and evolving nature of Jesuit education amid challenges for global cooperation. This triad constitutes the contemporary framework for Jesuit education as it is recognized by the 30th Superior General of the Society of Jesus, Father Arturo Sosa, S.J. (born in 1948 and in office since 2016).

The Society of Jesus places a high importance on preserving the distinct aspects of Jesuit education, particularly the adherence to Ignatian teaching principles, while also promoting constant evaluation and collaboration. Therefore, these documents contain a collaborative approach to adapting to the diverse needs of different cultures, languages, socio-economic backgrounds, and legal requirements across various educational levels, to promote student engagement in the promotion of the more universal good or betterment of all.

In line with its humanistic tradition, Jesuit education is distinctively Jesuit in the way it invites and accompanies students to mature and develop all their talents with academic rigor, consciousness, compassion, and commitment toward civic engagement (ICAJE, 1986a; Kolvenbach, 2000; Nicolas, 2011; O’Malley, 2015; Secretariat for Education, 2015). Since this maturation process is a continuum, it involves time and requires uninterrupted attention and care or cura personalis. Just as the spiritual director customizes the Spiritual Exercises based on each person's talents and relationship with God, Jesuit education supports students’ growth based on their needs and abilities.

Additionally, Jesuit schools focus on magis through training in spiritual discernment, community service, advocacy, and social justice efforts alongside global awareness programs. These initiatives in service learning, leadership, and counseling
promote student self-awareness, discipline, and overall growth, preparing them to
influence their communities and the world positively (Arrupe, 1973b; Brigham, 2019;
Clarence & Jena, 2022; Cuban & Anderson, 2007; Fleming, 1999; Gallagher, 2018;
Kolvenbach, 2000; Streetman, 2015)

Hence, a solid educational framework exists. But to actualize the shared values
and principles intrinsic to Jesuit education, it is crucial to identify key criteria for
decision-making. This process involves regular reflection on the practices, principles, and
objectives of Jesuit education, ensuring that it remains a living tradition, ever-responsive
to the changing landscapes of the educational world (Mesa, 2017; Nicolas, 2011;
O’Malley, 2015).

**Core Principles of Jesuit Education and Role in Society**

The historical journey of Jesuit education, marked by adaptation and expansion,
sets the stage for understanding its core principles, deeply rooted in Ignatian spirituality
and Christian humanism. This section explores foundational concepts such as *docta
pietas* and *vita civilis* and connects them with the Ignatian notions of *cura personalis*
and *magis,* crucial for comprehending Jesuit education's role in individual and societal
development.

Since 1548, when the first school for non-Jesuit students was established in
Messina, Italy, Jesuit educators have combined Italian humanism with Christian values.
The Jesuits provided youth with an education similar to that of their scholastics—young
seminarians preparing for the priesthood—students aspiring to piety and learning
philosophy, and theology (Casalini, 2019a; Donohue, 1963; Ganss, 1956; O’Malley,
1995). Jesuit school curriculum for lay schoolboys started with grammar (humanities and
rhetoric), progressing to philosophy, and for some, advancing to theology (O’Malley & Padberg, 2007). Non-Jesuit students worked on developing a well-educated (docta) attitude of faithful respect towards God, homeland, parents, and other relatives (reminiscent of Roman pietas, in W. C. Greene & Scheid, 2016). Hence, Jesuit students received education in docta pietas, i.e., an education based on good letters, wisdom, piety, morals, and civics that prepared them for vita civilis or life in society.

Central to Jesuit education are two key elements: fostering 'docta pietas' (educated piety) and preparing students for 'vita civilis' (civil life). Both essentially allow the Society of Jesus to ingrain its educational apostolate within the “First Principle and Foundation” of Saint Ignatius’ Spiritual Exercises, N. 23,3 at the core of every Jesuit activity. Docta pietas is the harmonious combination of knowledge, devotion, and civic responsibility. And this central aspect, blending erudition and piety, defines the identity of the Society of Jesus and its apostolates (Pavur, 2021b). Docta pietas emphasizes the

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3 “The human person is created to praise, reverence, and serve God our Lord, and by doing so, to save his or her soul. All other things on the face of the earth are created for human beings in order to help them pursue the end for which they are created. It follows from this that one must use other created things, in so far as they help towards one's end, and free oneself from them, in so far as they are obstacles to one's end. To do this, we need to make ourselves indifferent to all created things, provided the matter is subject to our free choice and there is no other prohibition. Thus, as far as we are concerned, we should not prefer health to sickness, riches to poverty, honor to dishonor, a long life to a short one. The only desire and the one choice that should be left to us is the desire and choice to serve God our Lord.” Original autograph text from Saint Ignatius: “El hombre es criado para alabar, hacer reverencia y servir a Dios nuestro Señor y, mediante esto, salvar su ánima; y las otras cosas sobre la haz de la tierra son criadas para el hombre, y para que le ayuden en la prosecución del fin para que es criado. De donde se sigue, que el hombre tanto ha de usar dellas, quanto le ayudan para su fin, y tanto debe quitarse dellas, quanto para ello le impiden. Por lo qual es menester hacernos indiferentes a todas las cosas criadas, en todo lo que es concedido a la libertad de nuestro libre albedrío, y no le está prohibido; en tal manera, que no queramos de nuestra parte más salud que enfermedad, riqueza que pobreza, honor que deshonrar, vida larga que corta, y por consiguiente en todo lo demás; solamente deseando y eligiendo lo que más nos conduce para el fin que somos criados”.

importance of a balance between rigorous academic cultivation, practicing one's faith, worshiping God, and obedience to family, church, and civil authorities. It accentuates the importance of a strong moral and spiritual foundation and encourages individuals to be guided by their faith in all aspects of their lives, including their engagement with the world and their participation in civic life (O’Malley, 1995; Scaglione, 1986).

Jesuit education also underscores vita civilis, nurturing responsible citizenship. The notion of vita civilis encourages students to engage in their communities and develop a sense of social responsibility while understanding their role as citizens in creating a more just and equitable society. Responsible Christian citizenship involves active engagement in political and social community life, upholding societal laws and institutions—honoring familia, patria et Ecclesia, in Ledóchowski’s words (1935, art. 7, n. 1.)—and contributing to the betterment of all in accordance with the Gospels and teachings of Jesus Christ.

The Jesuit docta pietas for vita civilis education rests on two pillars. Firstly, the modus parisiensis, which is a structured academic system emphasizing order, method, and the professor’s authority, unlike the freer system of Italian universities where students could choose their courses and professors (Codina, 2004). The Jesuits preferred order and method to ensure a deliberate and cohesive educational continuum that was finally enshrined in the Ratio Studiorum of 1599. Secondly, a curriculum based on “the humanistic idea of a classical, liberal arts education” (Scaglione, 1986, p. 56).

This combination provided students with a solid academic foundation upon which to build their creativity. On these grounds, Jesuits insisted on systematically educating younger Jesuits and lay students in both character (pietas) and the cultivation of the
virtues of *eloquentia perfecta* (rhetorical excellence based on coherent living), i.e.,
education for *docta pietas* (educated piety) and *vita civilis* or good citizenship (civil
service) (Donahue, 1992; Donohue, 1963; Kainulainen, 2018; O’Malley, 1995;
Scaglione, 1986). Drawing from Renaissance Humanism, “the curriculum, the
relationship between teachers and students, and everything else in the school would be
geared towards teaching the most profound art, the *ars bene beuteque vivendi* - the art of
living a happy and socially productive life for the benefit of oneself and others”
(O’Malley, 1990, p. 474). This holistic, pragmatic-thinking, and intentional approach to
education aimed to cultivate well-rounded and ethically grounded persons capable of
living virtuously and serving society.

Moreover, the systematic order of the *modus parisiensis* and the holistic approach
of humanistic education is deeply ingrained in the Christian foundation of the
Companions of Jesus. Education for *docta pietas* and *vita civilis* at Jesuit schools is
attached to the *raison d'être* or the apostolic end of the Society of Jesus. The papal letter
*Exposcit Debitum* by Julius III (July 21, 1550) outlines the Order's mission including the
defense and promotion of the Christian faith, among other means, through public
lectiones. Accordingly, the Jesuits embraced public education/lectures as a ministry that
simultaneously promotes moral character and intellectual virtue (*docta pietas*) in
educating persons who must strive to live in moral excellence through their occupations
and profession (*vita civilis*), as their religion requires.

This educational approach is of utility not only to students but to society in
general, as St. Ignatius wrote on December 1, 1551, to Father Antonio Araoz. Ignatius
insisted on the growing importance of the ministry of education: “*since young boys*
become grown men, their good education in life and doctrine will be beneficial to many others, with the fruit expanding more widely every day” (in Ganss, 1956, p. 29). Thus, the early establishment of schools for externals is part of the institutionalized effort to promote, as Pedro de Ribadeneira, S.J. (1527-1771) identified, the welfare of the commonwealth or in bonum republicae (Donohue, 1963 citing Ribadeneira, in Lukács, 1992, p. 510). And, in the latest iteration of this belief, Jesuit schools are called to commit to promoting global citizenship, creatively balancing the “tension between being locally and globally rooted and aware” (ICAJE, 2019, n. 187).

Fundamentally, Jesuit education forms part of the Society of Jesus' mission to develop individuals as knowledgeable believers and devout citizens dedicated to 'the greater glory of God' (ad majorem Dei gloriam), as the motto of the Society of Jesus says (Jesuits & Ignatius, 1996). In this sense, Jesuit education holds a longstanding tradition of Christian humanist formation crafted and promoted in the schools for externals to foster docta pietas for vita civilis ad majorem Dei gloriam.

Importantly, Jesuit education's purpose extends beyond the academic and professional realm. Rather it serves an explicitly theological and humanistic purpose: Ad majorem Dei gloriam or “for the greater glory of God,” which, in Irenaeus's words, is “the human person fully alive” (Against Heresies, book IV, chap. 20, pt.7). This theological purpose is a characteristically Ignatian view, presenting a pragmatic and instrumental conception of Jesuit schools, in which the finality of education is directly governed by a Christian concept of the finality of life itself and schooling is made to minister to the over-arching aim of love of God and love of mankind for the sake of God–as emphasized by John W. Donohue, S.J. (1963, p. 13).
Rooted in Catholic Christian values, Jesuit education also embraces and respects diverse perspectives and beliefs; it is an education “committed to being Catholic and to offer in-depth faith formation in dialogue with other religions and worldviews” (ICAJE, 2019, nn. 158–171). Jesuits believe that education should be open to all and that the diversity of perspectives and experiences that come from a diverse student body can enrich the educational experience for everyone. Consequently, Jesuit institutions strive to create a welcoming and inclusive environment where all students are respected and valued, regardless of their faith or socioeconomic background. Jesuit education emphasizes the development of critical thinking and the ability to reason, encouraging students to question, explore, form, and explain their beliefs. This approach helps to promote identity, open-mindedness, and critical tolerance, encouraging students to be respectful of the beliefs and perspectives of others.

Aligned with Saint Ignatius's vision, modern Jesuit education seeks to develop individuals holistically—'cura personalis' (Geger, 2014), fostering wisdom and charity (Ganss, 1956). While preserving humanistic values, Jesuit education continuously explores new pedagogical methods (Casalini, 2019a; Mesa, 2013) to educate persons of human excellence (Secretariat for Education, 2015). Today’s ideal Jesuit alumni embody a "well-educated solidarity" (Kolvenbach, 2000), aspiring to be “men and women for others and with others: who do not live for themselves but for God and his Christ” (Arrupe, 1973b). Following Arrupe’s guidance, the Society of Jesus aims to 'educate for justice,' shaping individuals dedicated to transforming the world for a 'more universal good' (magis) (Geger, 2012; ICAJE, 1986a; Jesuit Curia, 2017) “seeking the greater good in terms of what can be done out of a faith commitment with justice to enhance the
quality of peoples' lives, particularly among God's poor, oppressed and neglected” (ICAJE, 1993, n. 19).

In summary, the Society of Jesus consistently emphasizes educating responsible Christian citizens, i.e., knowledgeable individuals actively living their faith in society (docta pietas for vita civilis). Jesuit education aims to provide a solid academic, moral, and spiritual foundation, as well as opportunities for social awareness and civil commitment. This educational approach prepares students to balance knowledge with their faith and personal/professional responsibilities as members of diverse, multicultural, and intercultural societies. Ideally, Jesuit schools teach students to become their best selves (cura personalis) to serve the greater good and contribute to the betterment of the world (magis), especially among those who suffer from poverty, oppression, and neglect.

Aggiornamento: Evolving Jesuit Educational Practices and Current Challenges

With the historical and philosophical underpinnings established, this section examines how Jesuit schools have embraced modernization and adaptation. As a constant in the Jesuit educational tradition, change is essential to meet contemporary social and educational needs while staying true to its roots and ensuring relevance and effectiveness in today's educational landscape.

The transformative journey of Jesuit education, catalyzed by the Second Vatican Ecumenical Council’s (1962-1965) call for the Catholic Church to acknowledge the action of God in the world and history and invited Catholics to embrace their duties with God and the neighbor equally (Gaudium et Spes n.43), marked a significant turning point. General Congregation 31 (GC 31) in 1967, in decree 28, n. 27, started this aggiornamento or ‘bringing up to date’ of Jesuit education by broadening it to include
primary schooling—despite being approved by GC 20 (1814)—, technical training, and adult learning, addressing the dynamic needs of contemporary education while preserving its rich spiritual and philosophical heritage. Additionally, GC 31, decree 28 reinforced this innovative shift towards collaborative education, significantly involving lay educators and mandating the creation of a permanent committee of experts (later the International Commission on the Apostolate of Jesuit Education, ICAJE) that would reflect on and propose adjustments to Jesuit education in each region. This expansion marked a strategic departure from the Jesuits’ historical focus, predominantly on secondary and higher education, to a more collaborative, inclusive, and diversified approach: GC 31, Decree 33 (The Relationship of the Society to the Laity and Their Apostolate); Decree 28 (The Apostolate of Education) n.27. GC 32, Decree 2 (Jesuits Today) n.29. GC 33, Decree 1 (Companions of Jesus Sent into Today’s World) n. 47; CG 34 (1995), Decree 18 (Secondary, Primary and Non-Formal Education); CG 35 (2008), Decree 3 (Challenges to Our Mission Today: Sent to the Frontiers), nn. 23,28; GC 36 (2016), Decree 1 (Companions in a Mission of Reconciliation and Justice), n. 34.

Paul VI’s (1971) subsequent encyclical *Populorum Progressio* and apostolic letter *Octogesima Adveniens* provided the additional framework to discern and respond to the call of God in life events (Holman, 2014). Then, further reinforcing this trajectory toward broader and better educational service was General Congregation 32 (GC 32) in 1975. Decree 4 states: “The mission of the Society of Jesus today is the service of faith, of which the promotion of justice is an absolute requirement.” The Jesuits committed more explicitly to integrating faith and social justice into the educational ethos (Cosacchi, 2019). This pivotal declaration not only reaffirmed the commitment to intertwine faith
and justice within the educational framework but also significantly broadened the impact and scope of Jesuit education. It emphasized the integration of faith with everyday life, cultural understanding, and rational thought, thus heralding an era of apostolic renewal in educational programs. Moreover, GC 33 (1983), Decree 1, n. 47 called to promote and integrate social communications media to engage in non-formal education toward influencing responsible Christian citizenship and a deep love for God and neighbors (Mk 12:30-31). This renewal emphasized social inclusivity, extending Jesuit education to those economically and socially marginalized while instilling students with the values of social justice rooted in the Christian faith.

Central to this humanistic and social justice-oriented approach was the visionary leadership of Superior General Pedro Arrupe (1907-1991, in-office 1965-1983). Arrupe championed the formation of individuals who are academically proficient, spiritually aware, unselfish, and deeply committed to social justice (Meyo, 2014). In his seminal address, in Spanish, to the Tenth International Congress of Jesuit Alumni of Europe, in Valencia, Spain, on July 31, 1973, Arrupe asked:

> Have we Jesuits educated you for justice? You and I know what many of your teachers will answer to that question. They will answer, in all sincerity and humility: No, we have not […] We must help each other to repair this lack in us, and above all to make sure that in the future the education imparted in Jesuit schools will be equal to the demands of justice in the world.

Arrupe’s question was not a mere rhetorical technique. It was part of a fierce criticism of individualism and egotistic consumerism that paved the way to stating the renewed goal of Jesuit education:

> Our educational goal and objective is to form men and women who live not for themselves but for God and for his Christ, who died and rose for us. “Men and women for others [and with others]” are persons who cannot conceive of love of
God without love of neighbor. Theirs is an efficacious love that has justice as its first requirement; for them justice is the sure guarantee that our love of God is not a farce or perhaps a pharisaical guise to conceal our selfishness.” [Nuestra meta y objetivo educativo es formar hombres que no vivan para sí, sino para Dios y para su Cristo, para Aquel que por nosotros murió y resucitó; hombres para los demás, es decir, personas que no conciban el amor a Dios sin el amor al hombre, un amor eficaz que tiene como primer postulado la justicia y que es la única garantía de que nuestro amor a Dios no es una farsa, o incluso un ropaje farisaico que oculte nuestro egoísmo.] (Arrupe, 1973a).

Arrupe’s call to **educate for justice**, forming 'men and women for others'

epitomizes the Jesuit educational ideal to educate *ad cura personalis et civitatis utilitatem* (Lemke Duque & Zaldívar, 2021). It is a call to explicitly balance liberal arts, sciences, and spirituality with social justice–curriculum and method–while supporting students to be their best selves and to ‘become agents of change’ (Holman, 2014), taking part in the collective transformation of the world.

In this line, the last three Superiors General of the Society of Jesus—Peter Hans Kolvenbach (1983-2008), Adolfo Nicolás (2008-2016), and Arturo Sosa (2016 to present)—have pushed forward the humanist efforts of Jesuit education while acknowledging the negative social pressures against it. A detailed presentation of such an endeavor exceeds the limits of the present work, but Mesa (2017) has compiled classic texts on Jesuit education from Saint Ignatius to today. Nonetheless, there is a consensus in the Society of Jesus about the need for exploring new forms of understanding and conducting Jesuit education through practices more coherent with Ignatian ideals of faith, justice, and reconciliation (Jesuit Curia, 2017). It is for this reason that Jesuit education today needs to respond to its current framework and to the Universal Apostolic Preferences’ call:
to show the way to God through the Spiritual Exercises and discernment; to walk with the poor, the outcasts of the world, those whose dignity has been violated, in a mission of reconciliation and justice; to accompany young people in the creation of a hope-filled future; and, to collaborate in the care of our Common Home. (Sosa, 2019a)

Note that this newly formulated “mission of reconciliation” is not an innovation.

The mission of reconciliation in Jesuit education is an essential part of the Society of Jesus's mission, dating back to its founding charter, the *Formula of the Institute*, approved in 1550 by the papal bull *Exposcit Debitum*. The charter stated that the mission of the Jesuits includes not only the promotion of the faith but also the education of children and the illiterate, and the work “for the reconciliation of the estranged” (Aldama, 1990, pp. 2-23). This reconciliatory aspect of the Jesuits' mission has been fundamental to the educational endeavors since its inception, and it is confirmed as the fundamental mission of the Order, now stated as: “a mission of reconciliation and justice with God, within humanity, and with creation” (GC 36, Decree 1, 2017).

**Jesuit Education in the 21st Century: Governance and Global Networking**

The evolution of the living tradition of Jesuit education, marked by constant *aggiornamento*, ushers us into its current state in the 21st century. This section explores the structures of governance, and the mission of serving diverse communities and embracing social justice through the global networks currently defining Jesuit education, emphasizing its response to global challenges and the need for common criteria to maintain the commitment of the Jesuit educational network to accompany the youth in the creation of more just present and a hope-filled future (Sosa, 2019a).
**Leadership and Management**

Globally, Jesuit schools operate within a well-defined hierarchical structure, at the apex of which sits the Superior General of the Society of Jesus. This central authority plays a pivotal role in steering the global network of traditional Jesuit schools, along with overseeing other apostolic works.

Beneath the Superior General, two separate offices assist in the management of the schools: the [Secretariat for Education](#) and the [Secretariat for Higher Education](#). These Secretariats play a crucial role in advising and assisting the Superior General, focusing on enhancing the quality of Jesuit education. Their responsibilities include promoting adaptations to contemporary educational needs while safeguarding the shared Ignatian roots and the distinctive Jesuit identity across schools. This collaborative model ensures that Jesuit institutions globally remain responsive to evolving educational landscapes while maintaining their foundational principles.

At the local level, the governance of Jesuit schools is overseen by Provincials or Major Superiors, who act as regional leaders appointed by the Superior General. Each Jesuit province, comprising communities and apostolic works such as schools and parishes, is led by a Provincial. The Provincial's responsibilities encompass the holistic governance of Jesuit institutions within their jurisdiction, including overseeing administration, finances, and key personnel appointments. The Provincial serves not just as an administrative leader but also as a spiritual guide, ensuring that the schools under their purview embody and advance the mission and values of the Society of Jesus.

While Provincials hold ultimate authority, the day-to-day administration of Jesuit schools is typically managed by local administrators, such as school presidents or
principals. These individuals are responsible for the operational aspects of the school, ensuring that its mission and vision are actualized in daily educational practices. In the United States and other regions, schools often have boards of trustees who oversee financial and operational management, set policies, and provide strategic direction. These boards, comprising a mix of laypeople and Jesuits, collaborate closely with the school's leadership to ensure fidelity to Jesuit educational values and the fulfillment of the school's mission.

**Global Networks Embracing Inclusivity and Social Justice**

Historically, especially after the restoration in 1814, Jesuit education has been associated with serving primarily middle- and upper-middle-class demographics, focusing on cultivating future leaders with a strong moral and ethical foundation. However, in alignment with the Jesuit commitment to social justice and inclusivity, there has been a significant shift in recent decades. This shift, particularly reinforced in the wake of the Second Vatican Council, has led many Jesuit institutions to expand their mission to include and prioritize the education of marginalized and underserved communities. This evolution exemplifies the Jesuit ethos of 'men and women for others,' emphasizing education as a tool for social empowerment and change.

In this transformative journey, Jesuit educational institutions have increasingly dedicated resources and efforts to reach out to those on the peripheries of society. This includes offering educational opportunities to students from low-income backgrounds, underrepresented groups, and communities facing systemic challenges. Many Jesuit schools have implemented programs and curricula specifically designed to meet the
needs of these students, ensuring that quality education is not a privilege of the few but a right accessible to all.

Numerous initiatives exemplify this inclusive approach. The Cristo Rey Network in the USA, with its 37 schools serving over 12,300 students, is a testament to this commitment. Similarly, the Jesuit Refugee Service (JRS) manages 61 schools and educational projects in refugee camps, reaching approximately 180,000 individuals. Additionally, the Fe y Alegría movement, operating in 22 countries and serving one million students, is another powerful example of Jesuit education's outreach to marginalized communities. And Holy Family Professional Schools (SAFA) in Spain, with 26 centers educating 20,000 impoverished students in Andalucía. While part of the global Jesuit network, these institutions are specifically geared towards breaking the cycle of poverty and championing social justice through their educational and social programs.

These non-traditional Jesuit schools not only adapt their curricula to align with the current framework of Jesuit education but also integrate the Society of Jesus’s guidelines for social apostolate. This integration ensures that their educational offerings are not just academically sound but also geared towards promoting structural social change. By providing both aid and support to impoverished populations, these schools embody the Jesuit philosophy of serving the poor and promoting equity and justice through education. Initially, these non-traditional Jesuit schools operated somewhat independently of the Jesuit Secretariats for Education's oversight. However, with the creation of the Jesuit Global Network of Schools on November 26, 2021, these non-traditional schools are now
officially part of the same network as the traditional ones, and closer collaboration is expected.

The establishment of the Jesuit Global Network of Schools on November 26, 2021, marks a significant milestone in this journey of inclusivity and global collaboration. Initially outlined in *The International Apostolate of Jesuit Education: Recent Developments and Contemporary Challenges* (Mesa, 2013), this network fosters unified collaboration among all Jesuit schools. During the inauguration’s sermon, Fr. General said: “The network desires to be an expression of the commitment of the schools to work as a universal body with a universal mission and so to develop their full apostolic potential” (Sosa, 2021). The main tool supporting this effort is the portal [www.educatemagis.org](http://www.educatemagis.org). It embodies the Jesuit commitment to working as a universal body with a mission to develop full apostolic potential in education. This integration not only enhances the quality of education provided but also strengthens the collective effort to address global challenges, aligning with the Catholic Church’s 'Global Compact on Education,' which advocates education as a “universal right” and emphasizes a culture of care in education that “aims at the formation of the human person in the pursuit of his ultimate end and of the good of the societies of which, as man (sic), he is a member, and in whose obligations, as an adult, he will share” (Instruction “The Identity of the Catholic School for a Culture of Dialogue,” (2022) n. 6).

**Collaboration and Adaptation: Integrating Lay Educators and Jesuit Traditions**

In the evolving landscape of Jesuit education, the synergy between Jesuits and lay educators has become a cornerstone of its contemporary identity. This section delves into
the intricacies of this collaboration, examining its crucial role in sustaining the distinct Jesuit ethos within the educational framework.

Understanding, even briefly, the historical evolution and the formation process of Jesuits is imperative to appreciate the diverse staff composition in Jesuit schools today. This historical insight sheds light on the ongoing reflection and adaptation of Jesuit educational foundations and objectives within the context of changing times and needs.

While education is a key aspect of the Society of Jesus's mission, not all Jesuits are teachers. Nevertheless, many have had teaching experiences as part of their "regency" or magisterium. Named so because traditionally, magisterium implied teaching in a school (O’Malley, 1995, 2014). But, nowadays, it refers to a period when Jesuits take a break from their studies to work full-time in various roles within the Order, including teaching in schools, working in parishes, NGOs, or other apostolic work. This stage serves as an internship that helps Jesuits to understand their religious identity and vocation in practice, their purpose and mission, and to gain pastoral experience before advancing in their formation (O’Malley, 1990, 1995, 2015).

In the traditional model, Jesuits in their regency phase acquired hands-on knowledge about the educational ethos and objectives through immersive experiences. This tacit learning, once guided by the Ratio Studiorum, has now evolved. The contemporary scenario, marked by a reduced presence of Jesuits in teaching roles and a lack of formal pedagogical training and knowledge of the current framework set forth by the ICAJE or even insufficient familiarity with the foundational documents, presents both challenges and opportunities for Jesuit education.
An unintended yet beneficial consequence of these changes is the emergence of highly skilled lay educators. These professionals bring expertise in both their subject matter and pedagogical methods. However, this evolution necessitates a renewed emphasis on the Jesuit educational principles, a knowledge of the *why* and the *what for* of Jesuit education, ensuring that both Jesuit and lay educators are united in their understanding and implementation of these core values amid the urgency of local day-to-day decisions on *how* to implement Jesuit education in each school better.

In this reality, it is important to note that, today more than ever, the mere presence of Jesuits does not make an institution a Jesuit school. Instead, it is the understanding and commitment to the principles of Jesuit education by all educators and staff, including Jesuits, and implementing these principles in daily practice that makes an institution a Jesuit school.

It is also important to note that while Jesuit education is offered on a *de facto* K-20 array that goes from kindergarten to graduate school and includes technical and informal education, it must be seen as a deliberate and holistic continuum, guided by common educational principles and practices adapted to the local needs. The lack of a deliberate continuum leaves the *cura personalis* or whole person development to chance. And nothing is more foreign to Jesuit education than merely relying on the individual's social capital and on the school's educational offerings.

Thus, in this context, it becomes imperative to establish clear criteria that guide decision-making and ensure the intentional implementation of Jesuit educational principles. Such criteria would serve not only to maintain the tradition's humanistic core but also to adapt it effectively to contemporary educational landscapes. Consequently,
this research focuses on analyzing Jesuit education's nuances and official documents that constitute the current framework for Jesuit education to pinpoint key elements that encourage a consistent educational continuum. The aim is to foster holistic education, centering on continuous 'cura personalis' to nurture the whole person towards the 'magis' or greater good.

The central inquiry of this research, therefore, focuses on whether the enduring principles of 'cura personalis' and 'magis' can effectively function as foundational criteria for decision-making, guiding Jesuit education towards a coherent and dynamic continuum in the 21st century.

**Challenges and Responses**

Exploring the 21st-century landscape of Jesuit education reveals a spectrum of challenges necessitating innovative responses. This section critically assesses these challenges, ranging from socio-cultural and political-economic factors to educational dynamics, and proposes strategies rooted in 'cura personalis' and 'magis' to sustain Jesuit education's distinct ethos.

The role of education remains a subject of vigorous debate, with perspectives ranging from a tool for building national identity (Karataş, 2022), a market-economy instrument with economic values, a common or private good (Labaree, 1997), a vehicle for social transformation (Apple, 2008), to a way of maintaining the status quo (Tate, 2015, 2017). Contrasting these views, Jesuit education advocates for a humanistic approach, prioritizing personal and social development in response to God’s mission.

A prevailing trend in the global education sector is the commodification of learning (Davis, 2016; Moore, 2000), where education is increasingly viewed as a means
to compete in market-based societies. This perspective prioritizes technical skills and academic qualifications as social capital markers that reinforce hyper-specialization, labor segmentation, and social inequality (Bourdieu, 1986; Bowles & Gintis, 2012; Chubb & Moe, 1990; Friedman, 2003; Gorard et al., 2004; Jack, 2016; Labaree, 2012). This view of education sees pre-secondary and secondary schools as mere feeders to either higher education or vocational training (Haskins & Kemple, 2009; Hora, 2019; Jimenez, 2020). And the labor market defines the purpose, methods, and even scope of the studies (Dougherty & Lombardi, 2016; Fasih, 2008; Lauder & Mayhew, 2020; Pagés & Stampini, 2009). However, this economically pragmatic view of education becomes an internally contradictory operation that even produces the phenomenon of overeducation or education that is no longer profitable (Groot & Maassen van den Brink, 2000; Obiols-Homs & Sánchez-Marcos, 2018).

This trend emphasizes technical skills over holistic development, posing a significant challenge to Jesuit education's commitment to holistic growth and social equity. These barriers arise from local school establishment and staffing needs, government curriculum requirements, and educational market challenges, resulting in the self-segregation of students based on socioeconomic status, which is reinforced by the fact that each Jesuit school is financially and administratively independent. This is inevitable because “Jesuit education if it is to be real will both influence and be influenced by the socio-political order and the lived concrete praxis of the persons educated and educating” (Kavanaugh, 1989, p. 168). However, while Jesuit education is not immune to broader socioeconomic and sociopolitical pressures, it might distinguish itself through a steadfast commitment to its foundational values.
Faced with challenges like hyper-specialization and market-driven education models (Sagendorf et al., 2016), Jesuit schools, relying on Ignatian humanistic values (Modras, 2004), attempt to maintain their focus on holistic care or *cura personalis* (Kolvenbach, 2007), promoting service and action (Donohue, 1963), and human excellence (Mesa, 2013; Secretariat for Education, 2015), bound by faith and justice (Arrupe, 1973b; Cosacchi, 2019; Kavanaugh, 1989; Kolvenbach, 2000; Rausch, 2010). This involves counteracting trends of individualism, materialism, and wealth accumulation, often at the expense of others, that use education to perpetuate the *status quo* of the current 'social disorder' that Fr. Arrupe (1973b) criticized by cultivating persons for others and with others, people of compassionate consciousness (Kolvenbach, 2000) committed to social transformation (Nicolas, 2011; Sosa, 2021) toward the greater good or *magis*.

**Exploring the Potential of Unified Decision-Making Criteria**

This final segment builds upon the core values and purpose of Jesuit education and delves into the need for a simplified decision-making framework guided by the principles of *'cura personalis'* and *'magis'*. To address this challenge, it is essential to understand how these lofty principles could translate into concrete actions within the framework of educational operations. This section articulates the tensions between the theoretical ideals of holistic development and the pragmatic necessities of operational focus, emphasizing the need for unified decision-making criteria adaptable to diverse contexts.

In Jesuit education, the hierarchy of values places moral virtues above intellectual achievements without displacing academic excellence from the heart of Jesuit schooling.
This balance reflects a nuanced understanding of humanity, emphasizing the interconnected nature of moral, intellectual, and social development. Thus, the cultivation of character and intellect is a pathway to holiness through service to others within the societal context (*vita civilis*) because the integration of virtue, knowledge, and faith (*docta pietas*) is paramount. This holistic development includes intellectual growth intertwined with moral and spiritual development (Donohue, 1963; Ganss, 1956; Sosa, 2021). It enables individuals to meaningfully engage with and respond to the world around them as agents of change, giving reasons for their hope (1Pe 3:15), particularly in today's secular society.

The overarching goal of Jesuit education is the holistic development of well-cultivated and moral persons who are empowered to serve society, especially those at the margins of social opportunities: persons who became more to serve better (Arrupe, 1973b; Kolvenbach, 1996, 2000; Nicolas, 2011; Sosa, 2021, 2021). Yet, achieving this in a varied educational landscape calls for a practical approach that aligns the aspirational goals with the diverse realities of educational institutions.

While these ideals set a high bar for education, operational realities in different educational stages pose practical challenges. How do these moral virtues integrate into the curricular and administrative decisions at each educational level? Traditionally, education is divided into four stages: pre-primary, primary, secondary, and tertiary or higher education. Each has distinct characteristics and developmental focuses and corresponds to a specific type of educational institution. Each stage is integral to the overall educational journey, building upon the skills and knowledge acquired in the previous stage (Darling-Hammond et al., 2020; Guy & Byrne, 2013; J. Davidson et al.,
The goal is to facilitate continuous learning and personal development from early childhood through adulthood. The Society of Jesus uses the same structure. It accentuates basic organization around primary/secondary and higher education under the management of the Secretariat for Education and the Secretariat for Higher Education.

The operational needs of every educational level require particular attention. The Ratio Studiorum, fashioned out of the modus parisiensis and humanist curriculum, once provided a unified set of guidelines that orchestrated a scaffolding of cohesive education across Jesuit institutions within a tacit and unquestioned unified apostolic vision. Today's challenge is balancing this historical unity with the need for flexibility and responsiveness to the unique needs of each educational environment. Despite the existence of a modern framework in the triad of ICAJE (1986a, 1993, 2019) publications, the reliance on specific operational focuses at various educational levels can inadvertently neglect the holistic development central to Jesuit pedagogy. This segmented approach, though pragmatic, might inadvertently narrow the scope of Jesuit education to immediate operational needs, potentially compromising the broader objectives.

However, the 28 characteristics for Jesuit education in general (ICAJE, 1986a), the 10 global indicators for Jesuit schools (ICAJE, 2019), and the seven characteristics that should identify a Jesuit university today (Garanzini SJ & Baur, 2022) all sprang out of the core principles and the ultimate apostolic goals of Jesuit education and articulate around the Ignatian Pedagogical Paradigm (ICAJE, 1993). The characteristics/indicators for K-12 and higher education converge such that they might potentially preserve 'cura
personalis' (care for the entire person) and 'magis' (the pursuit of the more universal good) while facing pressure from immediate operational needs.

While variations could hamper efforts to maintain an uninterrupted and consistent educational journey for students in the implementation of Jesuit educational characteristics, variation is essential for adaptability and sustainability (Fullan & Loubser, 1972; Heifetz et al., 2009; Pugliese, 2016; Radó, 2020). Every Jesuit institution is expected to operationalize these values while adapting to the specific realities of ‘time, place, and persons,’ in line with St. Ignatius's principle of contextual adaptation. This lofty vision, however, must be grounded in the realities of varied educational environments, where operational needs can sometimes diverge from idealistic goals. This scenario presents the perfect Petri dish where the diversity among lay educators working at Jesuit schools brings a myriad of religious, philosophical, pedagogical, cultural, and socio-political views that will condition context adaptability. Here, despite sharing consensus on the intentions and goals of Jesuit education, the diverse interpretations of religious-educational terminology, varied understandings of ‘pedagogy,’ and differing political influences might create complexities and paradoxes in implementation (Hayes, 2006). And possible disagreements among educators regarding curriculum goals could lead to some fragmentation in the educational process (Flood et al., 1993).

How, then, can these noble ideals be effectively implemented in the face of operational constraints and diverse educational requirements? This diverse reality demands a continuous process of identifying and implementing the most effective means and academic policies to fulfill the purpose or the ends of the Jesuit school’s mission at every level. Educators thus need to be guided by a clear understanding of the underlying
principles (the way of fundamental rationale) and objectives (the what for or ultimate purpose), which in turn inform the methodologies (the how or the operations) of the institution. This underscores the importance of discerning leaders to ensure that educational practices are relevant and responsive to the unique environments in which they are situated and to the ethos of Jesuit education (Defeo, 2020). It calls for unified visions to guide such discernment.

Having a unified vision, as outlined by Kusnic and Owen (1992), is pivotal in maintaining coherence across multiple-decision-makers and multiple-vision-environments. Its absence might result in decisions with multiple objectives (Keeney et al., 1993). In the case of the Society of Jesus, this unified vision, which focuses on faith, knowledge, holistic development, and service, acts as a crucial anchor for the core principles and purpose of Jesuit education. Jesuit education, diverging from market-driven models, prioritizes student-centric learning geared toward promoting the common good and spiritual growth. Here, the common good is understood following Ignatius’ definition as “the good of the whole of humanity, extending to the ends of the earth […] because] the more universal the good is, the more it is divine” (Hollenbach, 2002, pp. 5–6). From the first school in Messina to the latest foundation, Jesuit education emphasizes fundamental Ignatian beliefs (Arrupe, 1973b; Donohue, 1963; Ganss, 1956; Kolvenbach, 1993, 1996, 2000; Nicolas, 2011; Sosa, 2021).

Balancing operational focus with holistic development is possible due to the Jesuits’ unique administrative approach that integrates unity amid diversity. As presented by Quattrone (2015), the Jesuits’ rationale behind their apostolic dynamism is founded on spiritual self-accountability and recordkeeping, driven by a strong belief in both moral
and administrative enhancement. This approach seamlessly connects the 'how' of a task to its 'why,' creating a cohesive and effective system that ensures unfolding realization at every step of the way without demanding unified procedures. It is a rationality that inextricably links the means to the ends. Hence, to foster a holistic continuum of Jesuit education amid diverse contexts requires a shift from operational tactics ('how') to foundational principles ('why' and 'what for'), as the unified vision, which is essential to the living tradition of Jesuit education in its current de facto K-20 global educational continuum.

The way to make a unified vision operational is by establishing criteria for discernment. While Jesuit schools uniformly emphasize faith, knowledge, holistic development, and service, the lack of a consistent, fundamental, and simplified framework for decision-making could lead to fragmented implementations. If this happens, this fragmentation might not only dilute the clarity and uniformity of the Jesuit educational approach but also risk schools succumbing to external market pressures that may overshadow the true ethos of Jesuit education. The lack of such fundamental criteria can lead to decision-making inconsistencies, particularly in schools with few Jesuits, boards of trustees dominated by external businesspeople with a market-driven mentality, and educators and staff without sufficient knowledge of Jesuit education who may prioritize operational forces over educational objectives. For example, when faced with budgetary constraints, a Jesuit institution might prioritize programs that most effectively embody these principles, ensuring resources are used in ways that truly reflect the school’s mission.
Therefore, the need to establish fundamental decision-making criteria in Jesuit education stems from the need to harmonize the shared core values of its global network with the imperative of a unified educational approach that does not imply a common curriculum or uniform methods. To align Jesuit education with its founding principles and purpose (why and what for), I employ the themes of *cura personalis* and *magis* as guiding criteria for decision-making "…desiring and choosing –in the words of Ignatius of Loyola– only what is most conducive for us to the end for which" (cf. *SE* N. 23) the Society of Jesus runs educational institutions worldwide. In this way, *cura personalis* and *magis* (Geger, 2012, 2014) could serve as a foundation for a fundamental criterion for decision-making that would promote coherence and will support institutional and curricular alignment to help avoid the gap between levels of education within Jesuit schools located worldwide. These two foundations might ensure the ethos of Jesuit education by safeguarding equity of care *ad intra* and social transformational change *ad extra*. 
CHAPTER 3: METHODOLOGY

Theoretical Framework

My approach to education, grounded in an onto-epistemic-axiological perspective (Kivunja & Kuyini, 2017; Lincoln & Guba, 1985), is further shaped by my experiences as a Jesuit educator championing the holistic development of the person. To support this broad view of education, in the following section, I consider various factors, including philosophy, sociology, pedagogy, neuroscience, environmental theory, and the mission of the Society of Jesus.

From a phenomenological standpoint, humans exist in the world as embodied individuals who reside within a natural environment that is perceived and coped with holistically as a gestalt (Merleau-Ponty, 1945). Yet, our perceptual and cognitive processes are not merely reflections of the natural world: they are also shaped by our radical imagination and the social imaginaries or significances we share as a result of the socialization process (Castoriadis, 1987). Therefore, our way of knowing and relating to the world can be described as a “pluralistic robust realism” (Dreyfus & Taylor, 2015), in which our shared access to the same phenomena yields a plurality of perspectives based on each subject’s life history. In this perspective, we learn to be persons and develop our understanding of the world through the transmission of explicit and tacit knowledge that reveals our somatic, relational, and collective possibilities for epistemological comprehension within particular contexts and interdependencies (Collins, 2010; Polanyi, 2005, 2009). Consequently, within the boundaries of particular hermeneutic frameworks,
we understand and communicate both natural and social realities (Fairfield & Geniusas, 2019; Gadamer, 2013; Grondin, 2016).

My viewpoint is that becoming a human being is a gradual and interaction-intensive process that integrates biological and cognitive aspects. Human beings are born underdeveloped and require extended time and social support for their biological and cognitive development (Bjorklund, 1997). Notably, the initial body growth rate decelerates, and adult-like conditions are not attained until after puberty. The prefrontal cortex and executive function do not fully develop until the mid-twenties due to the brain’s demand for more energy and time for development (Kuzawa et al., 2014; Mackey et al., 2013; Moriguchi & Hiraki, 2013; Yuan & Raz, 2014). This elongated phase of pre-adult growth facilitates extensive interactions with family members, caregivers, and peers, which is crucial for acquiring the human capacity for cultural learning (Han, 2017; McGilchrist, 2019; van der Meulen et al., 2020). During this protracted biological maturation, informal and formal education in cultural practices, symbolized in various representations and shared meanings (Chrisomalis, 2009), becomes a critical avenue for learning what it means to be human.

Comprehending human development requires a holistic approach that goes beyond biology to include contextual influences. The development of the human brain, as described by Shonkoff et al. (2000), progresses from neurons to neighborhoods, illustrating how learning adapts and evolves in tandem with an individual's environment and experiences (Bransford & National Research Council (U.S.), 2000; Tierney & Nelson, 2009). Moreover, this development is not limited to the brain alone; it encompasses the entire body (Roth & David Sweatt, 2011), and extends to the cultivation
of socially desirable behaviors shaped by contextual factors like empathy (Abramson et al., 2020; van der Meulen et al., 2020) and intelligence (Hanscombe et al., 2012; Resnick & Nelson-Le Gall, 2003). Consequently, human beings develop through ongoing exposure to educational processes that nurture social meanings and cultural practices, catering to the need for incremental assistance in realizing human potential. This underscores the importance of viewing education as a dynamic, multi-dimensional process shaped significantly by context.

While contemporary educational approaches often emphasize cognitive processes and reflective thinking, it is crucial to recognize the role of social and cultural dimensions in education. The concept of *paideia* in ancient Greece, as described by Jaeger (1965), was about nurturing children in line with the ideals of the polis, emphasizing a holistic approach to growth and socialization. Over time, the educational focus shifted more towards the mental processes of pedagogy, exploring the intricate relationship between body and soul (Crivellato & Ribatti, 2007). With the advent of modern philosophy, Descartes’ “*Cogito, ergo sum*” (I think; therefore, I am) highlighted learning as a primarily cognitive process. Consequently, the emphasis in education shifted towards developing good thinking skills, under the assumption that this would lead to appropriate behavior. John Locke later reinforced this perspective, positioning metacognition, as the foundation of knowledge, at the heart of education in *Some Thoughts Concerning Education* (1693). This focus on reflective thinking became central to understanding learning and teaching, associating education with the effective socialization of children and mental training, often overlooking biological or developmental aspects. With the rise of modern nation-states and the demand for widespread literacy to build national identity
(Karataş, 2022; Ogren, 2005; Steffes, 2017), the need for more research in pedagogy and psychology grew to enhance the reach and efficacy of formal education.

Currently, educator training programs are increasingly focusing on human development, socialization, and the broader scope of education. The work of influential scholars such as John Dewey (1933, 1938), Jerome Bruner (1966, 1974), Ulric Neisser (1967), and Lev Vygotsky (1981, 1986) has steered educational theory towards a constructivist approach. This approach views learners as active creators of knowledge and meaning within specific contexts and processes of learning. Such an approach aligns with the Ignatian tradition's focus on contextual sensitivity, emphasizing 'the circumstances of places, times, and peoples' to nurture a culturally responsive *paideia* that educates the whole person. Although more constructivist and child-centered approaches are encouraged in education schools, their practical implementation in education settings remains a challenge because educators are constructivist more in idea and desire rather than in practice (Labaree, 2005).

Contemporary cognitive approaches are increasingly bridging the gap between research and pedagogy, influenced by emerging neuroscientific insights into brain-based learning (Ansari & Coch, 2006; Baars & Gage, 2010; Forstmann et al., 2011; Hardiman et al., 2012; Miller, 2003; Zull, 2011). And those discoveries even inform possible educational reforms (Bransford & National Research Council (U.S.), 2000; Edelenbosch et al., 2015; National Academies of Sciences, Engineering, and Medicine (U.S.) et al., 2018; Tokuhama-Espinosa, 2019; Tokuhama-Espinosa & Willis, 2011). Although the expansion of links between neuroscience and education is still debated, there is ample evidence of their mutual influence and benefits (Bowers, 2016; Gabrieli, 2016; Howard-
Jones et al., 2016). Nonetheless, educator training and research, influenced by constructivist theories, are evolving to incorporate insights from neurosciences emphasizing that the importance of paying attention to the connections between experiences, emotions, and brain functions, and learning holds particular promise since learning is shaped socially, emotionally, and culturally (Immordino-Yang, 2016).

While the phenomenological constructivist perspective provides a foundation, Bronfenbrenner's Ecological Systems Theory offers a more holistic approach by incorporating both individual attributes and their contextual environments (Onwuegbuzie et al., 2013). Bronfenbrenner's theory considers various layers of environmental influence, from immediate settings like schools to broader societal and cultural contexts, all of which impact learning and development. This model integrates individual characteristics like age, gender, and socioeconomic status, as well as contextual influences like culture and history (Darling, 2007). In school environments, interpersonal, institutional, and district-level factors significantly shape students' development and learning, especially during adolescence (Eccles & Roeser, 2011). Trustworthy and supportive relationships between teachers and students and among peers, as well as high-quality curriculum and meaningful instruction, influence students' motivation, engagement, and learning beyond puberty (Wlodkowski, 2008). Consequently, developing personalized learning experiences requires a dynamic interplay between the teacher, the learner, and the learning content, as all educational interventions are embedded within specific institutional and cultural contexts.

Viewed from a socio-cognitive and developmental lens, education is a process of sharing and shaping meaning in culturally valuable ways, taking into account learners'
identities, cognitive and affective experiences, and educational settings. Education is pivotal in social transformation, reshaping personal structures and influencing developmental trajectories, thereby affecting social change and cultural values (Greenfield, 2009). And learning, thus understood as acquiring knowledge and developing new competencies, is an “eminently cultural activity that only takes place if it is socially organized and personally significant” (Perret-Clermont et al., 2004, p. 328).

In this sense, schools are not isolated from broader social conditions that impact individuals' developmental potential (Black et al., 2017; Maggi et al., 2010). Impoverished contexts severely limit children's development and learning. Poverty and abuse, for example, can hinder children's development and learning by increasing the risk of interpersonal trauma in childhood, which can lead to difficulties in executive function, emotion regulation, motivation, and dissociation awareness (Cross et al., 2017; De Bellis & Zisk, 2014). Such challenges can significantly impact academic performance, creating developmental and academic achievement gaps (Carrion & Wong, 2012; McInerney & McKlindon, 2014; Morton, 2018). Schools are developmental contexts where children and young people spend most of their time and where everything matters, affecting their ability to thrive and fulfill their human potential.

To address these challenges, educational research and practice must adopt a more holistic approach to learning that considers the complex interplay between individual and contextual factors. By doing so, policymakers and educators can create more equitable educational environments that meet the diverse needs of learners and help them reach their full potential. Thus, integrating education with broader social and cultural contexts is essential for fostering effective and equitable learning experiences, as highlighted by a
phenomenological, constructivist, and ecological learning theory. Educational research, accordingly, must address the profound relationships between socialization, development, and education, aiming for cultural relevance and legitimacy (Quintana, 2007). To achieve this, it remains essential to look beyond the classroom and take action on all levels of reality that affect children's and young people's lives (Morsy & Rothstein, 2015).

Ultimately, a more comprehensive approach to education can ensure that all individuals, regardless of their background or circumstances, have access to high-quality education that prepares them for success in an increasingly complex and interconnected world. Thus, this integrated theoretical framework aims to form the basis for the subsequent presentation of my personal positionality, focusing on creating equitable and culturally responsive learning experiences to help students attain the fullest of their potential to serve the human community.

**Positionality**

My formative years in the diverse and unequal settings of Ecuador, combined with my journey as a Jesuit, have deeply molded my perspective on education's pivotal role in fostering social change and equity. This blend of experiences, enriched by my interdisciplinary academic background in humanities, philosophy, ethics and politics, theology, and pedagogy, has been instrumental in shaping my comprehension of education's transformative power in society. Driven by this understanding, I am focused on identifying core principles that guide Jesuit education and delineating fundamental criteria for decision-making that ensure its alignment with these transformative ideals.

Growing up in one of the most unequal zones in the world (Ferreira & Schoch, 2020), I have witnessed firsthand how education can be both a tool for empowerment and
a mirror reflecting the reproduction of societal disparities. Recognizing that quality education is both a means to societal equity and a privilege not available to all, I am conscious of the advantages I had, receiving a top-tier education that my parents managed to afford despite financial challenges. This upbringing, coupled with Christian values from my K-12 education at La Salle and the Ignatian principles from my Jesuit formation, has reinforced my belief in the necessity of communal humanistic values as a bulwark against individual corruption and societal injustice. That is why my conceptualization of education, first shaped by family and later by academic pursuits, considers the interplay of family, school, and community in often contrasting environments (Carter, 2005; Moje, 2000; Valenzuela, 1999).

Beginning in 1998, my decision to join the Society of Jesus, dreaming of ministering at zones of social conflict, led me down an unforeseen yet enriching path, deeply immersed in the realm of Jesuit education. In each one of my roles as a student, teacher, counselor, administrator, and minister, I've gained a comprehensive perspective on educational challenges and opportunities, which has been instrumental in shaping my approach to developing criteria for Jesuit education. My work has covered the entire spectrum of Jesuit education, including adult vocational and popular radio education, across Ecuador, Peru, Chile, and the USA. Additionally, the privilege of the international scope of my education in various Jesuit institutions, has provided me with a global perspective, crucial for understanding the diverse facets of education. I have witnessed the transformative power of education in shaping individuals' lives and social opportunities (Pradilla et al., 2022; Rossignoli & Riggall, 2019). However, I have recognized how a lack of access to quality education not only impairs individuals but also
perpetuates injustices within their communities (Image, 2023; Oswald & Moriarty, 2009),
strengthening my commitment to ensuring that Jesuit educational practices align with our
humanistic values, aiming to bridge societal divides and foster equity. Consequently, now
committed to the educational apostolate as my primary Jesuit mission, my calling as an
educator is unwavering in expanding access to quality education, in line with Jesuit
humanistic educational values, to contribute to dismantling societal inequalities.

My journey through diverse cultural and educational landscapes has not only
shaped my worldview but also directly informed my academic pursuit of establishing
criteria for Jesuit education, marrying personal experience with scholarly inquiry. Thus,
informed by the ideals of 'eloquenta perfecta' and 'docta pietas,' i.e., to ‘walk the walk’
with faith and devotion, my ethical commitment to education drives me to critically
analyze and reinforce Jesuit educational values, advocating for their embodiment within
institutional practices. In this perspective, promoting justice and equality in education is
intricately tied to maintaining personal coherence and ethical integrity. Thus, developing
the pilot for this project and honing my research focus, I found myself interweaving
separate knots of experience into an existential gestalt in progress. Beyond intellectual
curiosity, I began my connection to humanistic education even before joining the Jesuits
through the guidance of the Christian Brothers and the reinforcement during my long
formation in the Society of Jesus. As an educator, I am committed to embodying 'cura
personalis' and 'magis' not just in my actions but also in advocating for these values
within institutional structures, upholding the dynamic tradition of Jesuit education and the
legacy and emphasis of the Jesuits in Latin America (Klaiber, 2004). Ethically, it compels
me to thoroughly explore Jesuit education's roots and content through qualitative
document analysis, encompassing shared experiences and reflections. My aspiration is to interpret this living tradition faithfully while inspiring creative progress across the K-20 Jesuit educational landscape.

I support a theoretical stance that identifies education as intrinsically political (Arendt, 1961; Castoriadis, 1991; Chubb & Moe, 1990; Dewey, 1916; Freire, 1985; Jaeger, 1965; Labaree, 1997). This stance acknowledges that formal education transcends classroom learning to shape individuals’ understanding of societal norms. The caliber of education has a profound impact, potentially equipping or marginalizing individuals for societal engagement, as evidenced by Arum et al. (2015), Biesta (2020), Bourdieu and Passeron (1990), Jaeger (1965), Labaree (1997, 2012), and Meyer (1977). Like other social institutions (Castoriadis, 1987), schooling practices tend to reduce themselves to their instrumental reproducibility, becoming mere instruments of the prevailing intellectual, political, and economic systems (Apple, 2012; Apple & King, 1977; Ball, 2013; Bourdieu, 1977; Bowles et al., 2003). However, despite the attempts to use education to maintain the status quo, schooling ought never to close the imagination (Greene, 1995), impede freedom (Freire, 1998), or prevent one from working for what can and needs to be done (Castoriadis, 1997) in order to enact justice (Frazer, 2005). This lens is particularly relevant in Jesuit education, necessitating a discerning examination of whether Jesuit educators align with the Society of Jesus’ commitment to reconciliation and justice (Jesuit Curia, 2017) or, inadvertently, uphold social inequities. Thus, my theoretical stance on the inherently political nature of education underpins my commitment to establishing decision-making criteria that align with the Jesuit mission of fostering societal equity and justice. Rooted in my Jesuit formation, my dedication to
social justice and equity is the driving force behind my pursuit to ensure that Jesuit
education continues to be a transformative force in society.

Driven by the Society of Jesus' mission, my goal is to identify decision-making
criteria for Jesuit education that reflect the principles of 'cura personalis' and 'magis.'
This endeavor stems from my personal commitment to the transformative power of
education. Grounded in such a perspective of education, my intention is to present
decision-making criteria reflective of 'cura personalis' and 'magis,' aiming to enrich
Jesuit education in line with its fundamental mission of reconciliation and justice. This
research aims to provide interpretative lenses based on the official documents on Jesuit
education to support making decisions better to promote whole-person education for the
greater and more universal good of students and their communities ad majorem Dei
gloriam.

The official Jesuit texts present an inherently political view of the individual and
the societal ideal pursued by the Society of Jesus, based on the Ignatian worldview that
asserts the kind of human person and the type of society the Society of Jesus aims to
achieve. Consequently, the principles of 'cura personalis' and 'magis' are central to
promoting whole-person education for the greater and more universal good of students
and their communities ad majorem Dei gloriam. Having simple, straightforward, unified
fundamental criteria that consist of two essential dimensions (cura personalis and magis)
could help to operationalize the 28 characteristics of Jesuit education (ICAJE, 1986b) and
the 10 global indicators of Jesuit schools (ICAJE, 2019) despite the diversity of
pedagogical methods utilized under the framework of the Ignatian Pedagogical Paradigm
(ICAJE, 1993).
As I embark upon this journey, my vision is to contribute to the advancement of the Jesuit educational mission as a continuum. My goal is to align with the current educational landscape while remaining true to the Ignatian spirit of comprehensive human development. This is a crucial aspect of the Society of Jesus's mission, which focuses on forming individuals, building communities, promoting reconciliation, and seeking justice.

**Research Design**

Motivated by my dedication as a Jesuit educator, I have embarked on a research journey to delve into the intricacies of the Jesuit educational mission. To achieve this, I have opted for a qualitative thematic analysis approach that entails a thorough examination of historical and contemporary documents. My ultimate goal is to identify the fundamental concepts that underpin the criteria for advancing a cohesive and organic Jesuit educational system. Employing qualitative methods and following a framework based on Ignatian principles of 'cura personalis' and 'magis,' I aim to present both concepts as the fundamental criteria for decision-making that could enhance our comprehension of Jesuit education and determine critical guidelines for its improvement.

**Method**

Document analysis is typically employed as a supplementary research method to assist data collection (E. J. Allan & Tolbert, 2019; Annamma, 2018; Cowling & Lawson, 2016) or to enhance validity through triangulation (Bowen, 2009; Cohen et al., 2018; Creswell & Guetterman, 2019; Denzin, 1978; Newby, 2014; Stake, 2010; Webb et al., 1973). However, it is also used as a stand-alone method (Altheide, 2000; Bowen, 2009; Gross, 2018; Mackieson et al., 2019). In this study, document analysis is utilized as a
distinct qualitative research method that uses systematic procedures to analyze
documentary evidence to answer specific research questions (Gross, 2018). This
approach involves a hermeneutic effort to scrutinize documents, paying attention to both
explicit and implicit meanings, as well as what is excluded or unsaid (Fairfield &
Geniusas, 2019).

Content analysis is conventionally defined as “the systematic, objective,
quantitative analysis of message characteristics” (Neuendorf, 2017, p. 19). However, this
narrow definition corresponds only to “basic content analysis” (Weber, 1990), which
aims to draw valid inferences from texts through objective, systematic, quantitative
descriptions and descriptive statistics of the manifest or textual content of the
communication (Berelson, 1952). In this form, this method implies a positivist or realist
epistemology (Drisko & Maschi, 2016). According to this view, content analysis is “a
research technique for making replicable and valid inferences from texts (or other
meaningful matter) to the contexts of their use” (Krippendorff, 2004, p. 18), which
includes human-coded analyses and computer-aided text analysis (CATA) (Neuendorf,
2017). However, since this study is rather hermeneutical, I do not use content analysis in
such narrow terms.

The meaning of a concept is not always clear, unambiguous, or free from
polysemy (Allan, 2007; Berelson, 1952; Eco, 1987; Lawton, 2011). Instead, the sense of
a text or content emerges through its analysis in specific contexts (Krippendorff, 2004),
suggesting a constructivist and interpretative foundation even though it requires
preserving the replicability and validity of the inferences (Krippendorff, 1969). Given the
living tradition of Jesuit education, this study utilized a type of content analysis more
suitable for investigating human communication through social artifacts (Babbie, 2016). The content under analysis is specifically the contemporary official documents of the Society of Jesus on education produced by ICAJE, which were coded to examine their explicit and implicit content using qualitative techniques without eliminating the heuristic inquiry (Douglass & Moustakas, 1985) but rather enhancing it. In this way, this research links my own experience and knowledge as a Jesuit and educator with the analysis of the documents.

Thematic analysis (TA) is not just a technique of collecting procedures for exploring text-grounded meaning. TA is a flexible and dynamic method that can yield insightful results depending on whether qualitative or quantitative criteria are used to analyze content. Boyatzis (1998) focuses on descriptive coding, primarily requiring word frequency counting as the interpretative bottom line, which is a quantitative process. Other approaches rely on general discourse or conversation analysis (Krippendorff, 2004) or carry out a “qualitative media analysis” as a supplementary method to the ethnographic content analysis (Altheide, 1996, 2000). For example, LaBelle (2011) does blend both criteria when he emphasizes the interpretative possibilities of content analysis for selecting ELL textbooks, building on Berelson (1952), Krippendorff (2004), Neuendorf (2002), and Weber (1990).

The thematic analysis consists of several steps, starting with data familiarization and code generation, followed by recoding, identifying themes, revising possible themes, and defining and labeling themes. Finally, the analysis concludes with writing the report (Braun & Clarke, 2006, 2013). Throughout the process, constant comparison of data and analysis is necessary to refine the adequacy of the results (Howitt & Cramer, 2017).
Miles et al. (2014) present coding methods paralleling to those of Schreier (2012), whose procedure entails the classification of materials according to main categories or dimensions. In both cases, the result comes out of focus coding frames in analogy to the categorical qualitative content analysis of Mayring (2000, 2014). All these versions of thematic and Qualitative Content Analysis (QCA) emphasize the need for high-quality data analysis to increase the trustworthiness of qualitative studies (Lincoln & Guba, 1985). Such trustworthiness, or ‘quality control,’ is achieved through explicit reflexivity and a systematic-process-oriented approach (Patton, 2015).

In TA, ‘quality control’ involves transparency and permanent self-evaluation in an iterative process to identify core ideas and steps to systematically select and segment data and write and refine code (Braun & Clarke, 2013). QTA requires procedural rigor, coding agreement, and even involves quantitative analysis (Mayring, 2014). In both cases, this process implies repeated piloting and evaluation of the coding framework regarding credibility, reliability, and validity (Barbour, 2014). Here, validity refers to truth claims regarding interpretative decisions that might be accepted as reasonable or possible within culturally bounded epistemic research communities (Carspecken, 1996; Haas, 1992; Kuhn & Hacking, 2012).

The interpretative nature of TA and QCA makes these methods suitable for addressing manifest content, latent interpretive themes/categories, and core ideas in texts as the primary content for analysis and interpretation (Braun & Clarke, 2021; Drisko & Maschi, 2016; Mayring, 2020). Both methods preserve the researcher's heuristic position as the interpreter of the coding process, making analytical and interpretative decisions.
Therefore, I use a combination of both methods to ensure procedural soundness and hermeneutic attention.

In terms of methodology, TA involves iterating through the process of familiarization, coding, generating initial themes, reviewing and developing end themes, refining, defining, naming, and writing. On the other hand, QCA follows an iterative, general content-analysis process (Figure 1), aiming to retain the strengths of quantitative content analysis and develop systematic, qualitatively oriented techniques (Mayring, 2014). This thematic qualitative analysis approach involved a systematic and iterative process of data coding and analysis (Drisko & Maschi, 2016) that allowed a hermeneutic circle of interpretation. This means that the context provided initial understanding, which generated new knowledge and insights, leading to a renewed understanding of the context (George, 2020; Grondin, 2016).

By combining these two methods, mainly following Braun and Clarke (2021), I aimed to analyze the documents of the Society of Jesus produced by ICAJE currently governing the educational apostolate. Specifically, the content analysis sought to shed light on two themes: cura personalis and magis. The themes were built upon the concepts of ‘cura personalis’ and ‘magis,’ which are deeply rooted in the Jesuit tradition from the very beginning of the order and have been properly developed during the definition of the terms in this study. The purpose of analyzing these two themes was to identify these as key elements underlying the fundamental criteria for the decision-making process for developing an organic continuum of Jesuit education.
Research Context

This project focuses on the thematic content analysis of contemporary documents that define the educational ministry of the Society of Jesus. Hence, the context of the work is primarily bibliographic in a historical context.

Since 1548, when the official educational apostolate of the Society of Jesus began with the founding of the Jesuit College in Messina, Italy, Jesuit education has undergone
revisions and creative updates through institutional documents. These documents contain policies and exhortations that respond to local religious, cultural, political, and social demands in funding and operating Jesuit schools. It is worth noting that, except for the *Spiritual Exercises* of St. Ignatius, every document guiding and inspiring Jesuit education is the result of extensive collective and authoritative teamwork born from first-hand experiences and cannot be traced back nor attributed to a single author.

More importantly, the Society of Jesus maintains accurate records of the publications that have shaped Jesuit education's meaning, ends, and means throughout each epoch. Both foundational and contemporary documents are publicly available in archives and libraries. Moreover, various electronic resources have expanded their accessibility, including the Jesuit Online Bibliography - a database of bibliographic records for scholarship in Jesuit Studies produced in the 21st Century (https://jesuitonlinebibliography.bc.edu/). For practical interpretative purposes, *Educatemagis*, the Secretariat of Education’s website for global collaboration, offers infographics that articulate an integrated perspective of Jesuit education today at the service of the Jesuits’ universal mission and facilitates global collaboration (https://www.educatemagis.org). Additionally, an official directory of the Society of Jesus education documents is readily accessible on the Jesuit webpage (http://www.sjweb.info/education/doclist.cfm).

By making these resources available, the Society of Jesus ensures that Jesuit educators worldwide have access to the collective knowledge and expertise of the Society's educational tradition. This way, Jesuits and Ignatian educators can continue to
uphold and develop Jesuit values in education in response to the needs and demands of the communities they serve.

Historically, Jesuit education has sought to balance liberal arts, sciences, and spirituality with social justice while supporting students to be their best and participate in the collective transformation of the world. The fundamental sources informing this sense of Jesuit education repose in The Constitutions of the Society of Jesus Part IV, the Ratio Studiorum of 1599, and the Spiritual Exercises of Saint Ignatius of Loyola (Casalini, 2019a; Casalini & Pavur, 2016; Donohue, 1963; Duminuco, 2000b; Fitzpatrick, 1933a; Ganss, 1956; Go, 2000; McGovern, 1988; Mesa, 2017; Modras, 2004; O’Malley, 1995, 2015; Padberg, 2021; Pavur, 2019; Schwickerath, 1904).

In a renewed missionary framework, the Society published new official documents to keep the tradition of Jesuit education alive in new and unique circumstances by insisting on ongoing discernment on the Jesuit identity of the schools, Jesuit-lay cooperation, and global networking. Those are the modern sources of Jesuit education and are the basis of this study. Three prominent publications focus on secondary and pre-secondary levels without excluding higher education. The Characteristics of Jesuit Education (ICAJE, 1986b), Ignatian Pedagogy: A Practical Approach (ICAJE, 1993), Jesuit Education Aims to Human Excellence: Men and Women of Conscience, Competence, Compassion and Commitment (Secretariat for Education, 2015), and Jesuit Schools: A Living Tradition in the 21ST Century - An Ongoing Exercise of Discernment (ICAJE, 2019). And, as Fr. General Sosa (2019) wrote in the official proclamation letter of the latter, “The three should be taken together as the contemporary framework of Jesuit Education.”
While no definitive documents from the Secretariat for Higher Education guide Jesuit higher education worldwide, the *International Association of Jesuit Universities* (IAJU) was formed in 2018 as an advisory and coordinating body to the Secretariat of Jesuit Higher Education. New guidelines are expected. Nevertheless, multiple addresses of the Superior General, especially Arrupe, Kolvenbach, Nicolás, and Sosa, offer the authoritative voice of the Society in this matter. Finally, non-traditional Jesuit educational networks (Fe y Alegría, Cristo Rey, and JRS) have subsequent policies, primarily through their founding documents and agreements with the Society of Jesus. Still, they are now part of the new Global Network of Schools formed on November 26, 2021.

My study delves into the contemporary official documents of the Jesuit educational apostolate. I used qualitative content analysis to study the selected corpus. This involved examining its content through questioning and organizing it into categories and themes. This approach aimed to gather input on fundamental criteria for decision-making to improve Jesuit education from kindergarten to university in the 21st century. My work responds to the Jesuit education demands for *magis* and the continuation of *cura personalis*. It builds upon the examen of the rationale and purpose of Jesuit education as stated in the Society of Jesus's documents, which define this ‘living tradition’ as an ongoing exercise of discernment to adapt to the changing times and circumstances of our world and the needs of the students (ICAJE, 2019; Sosa, 2019b).

**Data Collection**

The present study follows the combined core structure for TA and QCA process modeled by Braun and Clarke (2006, 2013, 2021) and Mayring (2000, 2014, 2015, 2020). The data collection process started by selecting relevant documents, and throughout the
process, the interpretation of the material considered its communicative context. The focus was on identifying each case's subject matter or research object and examining its origin and effect. The documents were chosen based on their relevance to defining the foundational and contemporary Jesuit education framework and identifying the themes of *cura personalis* and *magis*. These were then used to identify the fundamental criteria for discerning that, eventually, could be useful for advancing an organic continuum of Jesuit education.

Therefore, this study relies on three documents that form the current framework for Jesuit education as stated by the Jesuit’s Superior General, Fr. Arturo Sosa (2019b), which were prepared by the International Commission for the Apostolate of Jesuit Education, ICAJE. The first document, *The Characteristics of Jesuit Education* (ICAJE, 1986b), provides “a common vision and a common sense of purpose… a standard against which we measure ourselves,” according to the 29th Father Superior General Peter Hans Kolvenbach (1928-2016, in-office 1983-2008) (Kolvenbach, 1986). The second document, *Ignatian Pedagogy: A Practical Approach* (ICAJE, 1993), recommends a five-dimensional teaching style or what is known as the Ignatian Pedagogical Paradigm (IPP). The third document, *Jesuit Schools: A Living Tradition in the 21st Century - An Ongoing Exercise of Discernment* (ICAJE, 2019), advocates for the continuous and renewed integration of new education methods to form people for human excellence, as defined in *Jesuit Education Aims to Human Excellence: Men and Women of Conscience, Competence, Compassion and Commitment* (Secretariat for Education, 2015), which outlines the ideal characteristics of every Jesuit *alumnus* and *alumna*. 
To analyze the current framework further, additional supporting documents included the fundamental sources of Jesuit education: the *Spiritual Exercises* and Part IV of the *Constitutions of the Society of Jesus*—both written over several years (1528-1556) by St. Ignatius of Loyola—and the *Ratio Studiorum* of 1599. Supplementary documents include the decrees of General Congregations 31 to 36 referring to education, the Universal Apostolic Preferences, Superior Generals’ addresses, guidelines of the Secretariats and networks, and relevant documents from global cycles of reflection and educational meetings.

I chose these documents for their official and universal character, i.e., they contain the official guidelines and policies for Jesuit education worldwide. Second, I have selected this corpus because any interpretative reflection must be integrated into the historical tradition of the educational mission of the Society of Jesus, which at the same time remains faithful to its origins and undergoes a constant renewal or *aggiornamento* “according to the times, contexts, and peoples.” Third, working with these documents is an opportunity to engage in additional considerations of this living tradition, including references towards establishing fundamental criteria for decision-making towards a deliberate organic educational continuum. Finally, I have collected and analyzed these documents since this is a privileged opportunity to access the actions and reflections left in written records in the field of Jesuit education by witnesses and participants.

All of these documents were available to me in electronic format, whether as publications open to the public or as part of *ad usum nostrorum tantum* (for the use of ours) made available to Jesuits through a web portal (https://www.sjweb.info/signinC.cfm?Tab=1). The Society of Jesus typically translates
every official document into English, French, and Spanish, and none of the education-related documents are confidential or subject to embargo. Therefore, they are readily available for academic purposes without ethical concerns. The Raynor Library at Marquette University offers additional books and articles on this topic. To facilitate the thematic content analysis, I digitized all other documents used during this research and kept digital copies on redundant backup systems without violating copyrights. Finally, I relied heavily on the database of bibliographic records for scholarship in *Jesuit Studies* produced in the 21st Century: The Jesuit Online Bibliography (https://jesuitonlinebibliography.bc.edu/).

**Ethical Considerations**

The analysis of the documents did not involve collecting data from individuals. Therefore, it did not require the submission of a research proposal to an institutional review board. The work is exclusively based on public documents of the Society of Jesus that regulate its educational mission. The copyrights of the Society of Jesus are protected by acknowledging the origin of the documents and citing them properly, along with any additional sources. Additionally, the TQCA method (Braun & Clarke, 2006, 2013, 2021; Mayring, 2000, 2014, 2015, 2020) used in this research enhances the study's trustworthiness and maintains scientific integrity by providing adequate techniques.

**Data Analysis**

This study used a systematic, thematically hermeneutic content interpretation that includes reflexive theme analysis (TA) and qualitative content analysis (QCA), building on the pathways of Virginia Braun and Victoria Clarke, and Philip Mayring, respectively. In the first phase, a thematic analysis (TA) according to the grounded coding process
(Braun & Clarke, 2013) allowed the formation of inductive themes of interpretation that presented new meanings amid the content of the official education documents of the Society of Jesus. The aim was to examine whether new insights arise around the Ignatian concepts of *cura personalis* and *magis* when considered interpretative themes.

In the second phase, an explicit QCA is in the foreground. I used the two concepts mentioned above as categories to guide the reading and analysis of the document’s content. QCA, in Mayring’s words, consists of a bundle of techniques for systematic analysis with “an approach of empirical, methodological controlled analysis of texts within their context of communication, following content analytical rules and step-by-step models, without rash quantification” (Mayring, 2000, [5]). It is characteristic of QCA that allocating categories to text passages always remains an act of interpretation despite the likelihood of a computer-aided coding (Mayring, 2020). In this sense, a concurrent methodology emphasized the need for conscious understanding and construction of categories/themes, as in Braun and Clarke (2013).

Rule-based handling of the materials is required for this qualitative content analysis. Therefore, the pre-established hermeneutic circle of the living tradition of Jesuit education helped in choosing how to approach the selected material around the fundamental principles and purpose of Jesuit education, which defined in which order and what conditions must be met for coding to be carried out (Mayring, 2014, 2015). The documents were read, recognizing what these sources were saying and why. This benchmark for reading and coding implied a hermeneutic approach because, without reading each document in its context, the risk of misinterpretations increases, and it would have jeopardized the likelihood of a trustworthy inquiry.
Since TA and QCA, or TQCA, are not rigid standardized instruments that use purely formal techniques, the research demands constant check-in on whether the process of category formation is appropriate to the material and the research question at hand, i.e., the analysis needed always to be hermeneutically attuned. Therefore, the specific categories were tested in pilot studies before the complete analysis of each document. Theory-guided analysis concerning all procedural decisions used references to the most relevant research on the issue (and on a comparable subject field), which in this study relates to the foundational sources of Jesuit education and its scholarly commentaries.

During the phases of open, focused, and axial coding (Cohen et al., 2018), it remained crucial to interpret and identify the explicit and latent/tacit/implicit references to the “care for the formation of the whole person” or cura personalis, and expressions and exigencies for naming and pursuing “the more universal good” or magis (Geger, 2012, 2014). The core of this process was the reduction of objects or units of analysis into these focused categories to enable the comparability of findings and reliability tests. Since the Jesuit order's inception, these themes/categories have been recognized as part of the hermeneutic living tradition of Jesuit education. However, in this TQCA, they were redeveloped and tested during the initial analysis of The Characteristics of Jesuit Education (ICAJE, 1986b). This document was ideal for exploring themes/categories because it is the next official release after the Ratio Studiorum and presents 28 characteristics that define Jesuit education. Content-analytical units remained very open-ended in this inductive theme/category formation process.

While TA made it possible to find new ways to understand content more flexibly and emphasized the possibilities of recognizing hermeneutic serendipities, QCA’s
flexibility deferred to content-related arguments. Therefore, combining both methods was expected to provide enough hermeneutic flexibility and procedural rigor. Amid this continuum of interpretative analysis, the focus of this study was always a creative but faithful interpretation of the documents’ content and intention, i.e., it was a process of interpretative-creative fidelity or aggiornamento. Then, I worked to integrate quantitative analysis steps for themes/category frequencies with hermeneutic heuristic insights. Finally, quality criteria had to remain to understand and interpret unreliability throughout all processes, especially during the pilot phase. For the development (Figure 2) and formation (Figure 3) of categories, the core structure of the QCA’s model was preserved and flexibly adapted to the purpose of this study under the lenses of TA.

This study aimed to elucidate fundamental criteria to guide the discernment process for constructing an interpretative/hermeneutical framework for a Jesuit education continuum based on ‘cura personalis’ and ‘magis.’ TQCA was used to analyze the Society of Jesus’s contemporary education documents to establish whether it could be possible to use its explicit and latent content to build themes such as cura personalis and magis that can be used as fundamental criteria for decision-making and discerning because they convey the essential principles and purpose of Jesuit education. Establishing such criteria could help future research to integrate these fundamental notions into concepts informing a K-20 hermeneutical framework for the continuum of Jesuit education. However, in this study, the notions of cura personalis and magis were meant to serve as fundamental criteria that could be used for advancing the discernment toward articulating Jesuit education in terms of deliberate and continual humanistic formation. Using a discernment or decision-making based on shared fundamental criteria could
generate creative alignments and inter-institutional collaboration throughout the entire range of the formal educational span.

Figure 2

*Step Model of Inductive Category Development* (Mayring, 2000 [11])
Figure 3

Process Model of Inductive Category Formation (Mayring, 2015, p. 375)

Subject matter, theory, aims of analysis

Establishment of a selection criterion
  Category definition
  Level of abstraction

Working through the material line by line
  Category formulation
  Subsumption or new category formulation

Direction of the analysis

Revision of the categories after 10-50% of the material

Final working through the material

Building on main categories if useful

Interpretation of the results in relation to the main problem and issue
CHAPTER 4: RESULTS

This study examines the current framework for Jesuit education (ICAJE, 1986a, 1993, 2019) to identify its principles and purpose. The objective here is to showcase cura personalis and magis as the crucial elements of Ignatian education that can serve as criteria for decision-making. In this chapter, I focus on their usefulness to assess identity and guide decision-making in Jesuit schools.

Current Framework for Jesuit Education


The Characteristics of Jesuit Education (1986)

"The Characteristics of Jesuit Education" (CJE) is the result of four years of labor by the International Commission on the Apostolate of Jesuit Education (ICAJE). This document is brief but prescriptive on the distinctive nature of Jesuit education. It describes it as 'a way of proceeding' grounded in Ignatius of Loyola's world vision. Further, the document reflects on how this rich heritage can be adapted to meet contemporary educational needs. The document consists of 198 numbered paragraphs, making it easy to reference, and is organized into 9 principal sections. Each section in CJE presents a thematic Ignatian worldview and states the corresponding characteristics.
of Jesuit education—a total of 28. It includes a tenth section dedicated to briefly specifying certain aspects of Jesuit pedagogy from the *Spiritual Exercises*, and a few examples of directives from the *Constitutions* of the Society of Jesus and the *Ratio Studiorum*. Finally, CJE presents two appendices. The first one provides the historical background of Ignatius, the early Jesuit schools, and the *Ratio*. The second appendix maps all 28 characteristics in a schematic overview according to their roots in the Ignatian worldview.

Table 1

*Characteristics of Jesuit Education*

<table>
<thead>
<tr>
<th>Characteristics of Jesuit Education</th>
<th>Ignatian View</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 God</td>
<td></td>
<td>1 It is word-affirming.</td>
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<td></td>
<td></td>
<td>2 It assists in the total formation of the individual.</td>
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<td></td>
<td></td>
<td>3 It includes a religious dimension in education.</td>
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<td></td>
<td></td>
<td>4 It is an apostolic instrument for quality life, which is preparation for eternal life.</td>
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<td></td>
<td></td>
<td>5 It promotes dialogue between faith, culture, and science.</td>
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<tr>
<td>2 Human Freedom</td>
<td>6 It insists on care and concern for each individual.</td>
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<td></td>
<td>7 It emphasizes students’ activity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 It encourages lifelong openness to growth.</td>
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</tr>
<tr>
<td>3 Quest for Freedom</td>
<td>9 It is value-oriented.</td>
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</tr>
<tr>
<td></td>
<td>10 It encourages realistic knowledge, love, and acceptance of self.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11 It provides realistic knowledge of the world.</td>
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<tr>
<td>4 Jesus Christ</td>
<td>12 It proposes Christ as the model for human life.</td>
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<tr>
<td></td>
<td>13 It provides pastoral care.</td>
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<tr>
<td>5 Action</td>
<td>14 It promotes celebration, prayer, worship, and service.</td>
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<td>----------</td>
<td>----------------------------------------------------------</td>
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<tr>
<td>15 It prepares for active life commitment.</td>
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<td></td>
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<tr>
<td>16 It serves the faith that does justice.</td>
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<tr>
<td>17 It seeks the formation of ‘men and women for others.’</td>
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<td></td>
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<tr>
<td>18 It manifests particular concern for the poor.</td>
<td></td>
<td></td>
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<tr>
<td>6 Church</td>
<td>19 It is an apostolic instrument for the mission of the Catholic church.</td>
<td></td>
</tr>
<tr>
<td>20 It prepares students for active church and community participation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Magis</td>
<td>21 It pursues excellence in human formation.</td>
<td></td>
</tr>
<tr>
<td>22 It witnesses to excellence.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Community</td>
<td>23 It stresses lay-Jesuit collaboration.</td>
<td></td>
</tr>
<tr>
<td>24 It relies on spirit of community.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25 It takes place in school structures that promote community.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Discernment</td>
<td>26 It promotes adaptation of educational methods to efficiently achieve the end purpose of Jesuit education.</td>
<td></td>
</tr>
<tr>
<td>27 It is a Jesuit system of schools.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28 It provides professional training and ongoing formation.</td>
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<td></td>
</tr>
</tbody>
</table>

**Ignatian Pedagogy: A Practical Approach (1993)**

"Ignatian Pedagogy: A Practical Approach” (IPP) presents the pedagogical style that makes it possible to put into practice the 28 characteristics of Jesuit education. Emphasizing the integration of the intellectual, spiritual, and moral dimensions through actual experience, reflective inquiry, and a concrete response to it, IPP highlights the intent of Jesuit education in forming whole persons who are intellectually competent, open to growth, religious, loving, and committed to justice. The document has 163 numbered paragraphs and outlines key features of the Ignatian paradigm (experience-reflection-action) in a pedagogical framework that includes context and evaluation.
Therefore, the Ignatian Pedagogical Paradigm is presented as a style of teaching that emphasizes five dimensions (context, experience, reflection, action, and evaluation) wherever the educational process is involved; a dynamic and iterative teaching style that creates a continuous flow (Figure 4) from evaluated context to experience, leading to reflection, then action, and back to evaluation, which feeds into context again. The document also addresses the challenges and practical applications of implementing this paradigm in modern educational settings.

Figure 4

*Ignatian Pedagogical Paradigm*
"Jesuit Schools: A Living Tradition in the 21st Century. An Ongoing Exercise of Discernment" (LT21) is a practical and forward-looking document from ICAJE, prepared since 2011, to address the evolving challenges and opportunities globalization presents to Jesuit education in the 21st century. As the title suggests, it guides ongoing discernment rooted in the Spiritual Exercises, and it is crafted as a lively tool that can be returned to and used again and again. Consequently, as an eminently practical guide, it contains 290 numbered paragraphs and 28 exercises for discernment at the end of each section that include concrete questions for all Ignatian educators about their knowledge of Jesuit education and its implementation in day-to-day practices at Jesuit schools. LT21 emphasizes the importance of adapting to global changes while staying true to the core principles of Jesuit education and responding to the Universal Apostolic Preferences of the Society of Jesus. LT21 provides 10 global identifiers or commitments to assess Jesuit institutions' identity and educational impact.

1. **Commitment to being Catholic, emphasizing in-depth faith formation**, and engaging in dialogue with other religions and worldviews.

2. **Creating a Safe and Healthy Environment**, ensuring that all students and staff experience a safe, healthy, and nurturing educational environment.

3. **Commitment to Global Citizenship**, fostering a sense of global responsibility, encouraging students to think and act as citizens of the world.

4. **Care for All Creation**, emphasizing the importance of environmental stewardship and the responsibility to care for the Earth.
5. **Dedication to Justice**, advocating for the marginalized, and working towards a more equitable society.

6. **Accessibility for All**, being inclusive and accessible to students from all backgrounds, ensuring equity in educational opportunities.

7. **Embracing Interculturality**, promoting intercultural understanding and respect among students, reflecting the diversity of the global community.


9. **Commitment to Human Excellence**, aiming for the holistic development of individuals, striving for excellence not only academically but also in the 4Cs: conscience, competence, compassion, and commitment.

10. **Lifelong Learning**, instilling the value of continuous learning and personal development, and preparing students to be lifelong learners.

**Analytic Process**

I used thematic qualitative content analysis (TQCA) to explore the Ignatian concepts of *cura personalis* and *magis* in the current framework for Jesuit education documents. The process involved a detailed and iterative approach to data coding and analysis, creating a hermeneutic circle of interpretation (Drisko & Maschi, 2016). It included repeated refining of the coding framework around the themes of *cura personalis*, *magis*, and their interactions through interpretative decisions that might be accepted as reasonable or possible within the research community (Carspecken, 1996; Haas, 1992; Kuhn & Hacking, 2012) of experts in Jesuit education.
The iterative coding process combined initial grounded coding and hermeneutical coding around analytical themes, developing groups of codes or categories and, finally, themes with the assistance of Atlas.ti. This combined technique permitted multiple levels of analytic coding, giving the possibility to work inductively and deductively until achieving reasonable saturation (Glaser & Strauss, 1999). The process involved self-evaluation while identifying core ideas, carefully selecting and segmenting data, and grouping grounded codes to develop the hermeneutical themes and their categories. In this context, integrating grounded codes based on word presence (Boyatzis, 1998) became possible by placing them into categories and sub-categories that respond to hermeneutically developed themes (Braun & Clarke, 2013, 2021). In this way, even specific or technical operational concepts feed into broader categories and themes. By incorporating statistical techniques, I preserved the strength of qualitative content analysis in this procedure (Mayring, 2000, 2014, 2015). This allowed for new insights and knowledge to emerge, leading to a renewed understanding of the texts and their context (George, 2020; Grondin, 2016).

Beyond counting words, word presence counts toward interpretative concepts. I conducted additional statistical analysis of code frequencies and interactions to understand better the meaning of concepts and the strength of their connections. Correlation is defined by Merriam-Webster dictionary as “a relation existing between phenomena or things or between mathematical or statistical variables which tend to vary, be associated, or occur together in a way not expected on the basis of chance alone.” By using correlational values based on co-occurrences, I was able to focus on how closely variables (themes, categories, sub-categories, and codes) are related within the thematic
code system. Correlation values are standardized, which means that it is possible to focus on the strength of the relationship between variables, regardless of how often they appear. Due to the interpretative nature of this coding method, I do not claim statistical validity. The groundedness of the codes (Gr = number of times the code has been used) and correlational values lead directly to the text, considering the strength of the co-occurrence within the semantic context and the themes they represent.

I calculated themes/categories based on their co-occurrence frequencies across different observations or contexts. The Pearson correlation coefficient (r) was used to calculate the relationship between the two variables. The computation involves dividing the covariance of the two variables by the product of their standard deviations. The result ranges between -1 and 1, where 1 indicates a perfect positive linear relationship, -1 indicates a perfect negative linear relationship, and 0 indicates no linear relationship. To calculate the Pearson correlation, I used the Pandas library's corr() function in Python. This function automatically handles the calculation of means, standard deviations, and covariance to provide the correlation coefficients for every pair of themes/categories in the co-occurrence matrix.

As part of this TQCA, I used a code system organized around three major themes and several categories, which include sub-categories and their codes. In some cases, a sub-category is also a code. The meaning of ‘cura personalis’ and ‘magis’ have been sufficiently developed during the term definition, rendering it unnecessary to repeat here. The development of these three themes aims to support a response to the research
question: Can *cura personalis* and *magis* be the fundamental decision-making criteria for Jesuit education?

To interpret thematic relationships, I used the Code System Based on Three Themes:

- **Cura Personalis**: elements of care for the individual's holistic development within the human community.
  - **Holistic Development**: Codes for references to the development of intellectual, moral, spiritual, and physical aspects of a student.
  - **Individual Attention**: Instances where the focus is on personalized care, guidance, and resource allocation tailored to individual student needs.
  - **Incarnational Emphasis**: Passages emphasizing the uniqueness and inherent dignity of each individual as a creation of God.
  - **Social Engagement**: Document sections highlighting the importance of civic engagement and social responsibility as part of education.
  - **Integration of Faith and Education**: References to the integration of Christian faith and academic learning.

- **Magis**: discerned pursuit of the greater good.
  - **Striving for Excellence**: Passages discussing the pursuit of excellence in various fields – academic, moral, spiritual, and civic.
  - **Service to Others and Common Good**: Instances highlighting actions taken for the benefit of others and the broader community.
- **Ignatian Discernment**: Sections that focus on decision-making processes aligning with God’s will and the greater good.

- **Continuous Improvement**: References to the ongoing efforts for growth, innovation, and betterment in educational practices.

- **Contextual Application**: Instances where magis is applied, considering specific circumstances and individualized approaches.

- **Integration of *Cura Personalis* and *Magis***: Codes presenting combined connotations.
  - **Decision-Making**: Analysis of elements or criteria for decision-making manifested in the policies and practices of Jesuit educational institutions.
  - **Educational Policies and Practices**: Analysis of how these principles manifest in Jesuit educational institutions’ policies and practices.
  - **Student Development**: Instances showing the combined effect of *cura personalis* and *magis* on student development.
  - **Institutional Mission and Vision**: References to how these principles of *cura personalis* and *magis* shape the broader mission and vision of Jesuit institutions.
  - **Jesuit education**: Highlights of descriptions or references to the identity of Jesuit education and its expected practices regardless of whether they refer explicitly to *cura personalis* and *magis*.

After reviewing the consistency of the entire code system, I analyzed the global co-occurrences to identify semantic relationships. While Sankey diagrams can help identify relationships in traditional thematic analysis, I focused on using heatmaps of
correlations of the semantic codes to maintain the quantitative dimension of TQCA. A heatmap of co-occurrences with a correlation matrix provides a better visualization of the strength of the relationship between different aspects of the themes. The high correlational values indicate the semantic strength of those relationships and are expected due to the hermeneutical building of the code system.


**Visual report**

The heatmap of the top 25 general co-occurrences (Figure 5) shows how ‘cura personalis’ and ‘magis’ are deeply interconnected in the analyzed documents of the current framework for Jesuit education. A cluster of high correlations indicates a group of interconnected concepts, while a cluster of low correlations suggests a set of diverse or unrelated notions. However, interpreting relationships among variables without accurately placing them into the code system loses the semantic nuances of the variables. Therefore, a new matrix was created, preserving the correlational values but organizing variables around groups of themes (Figure 6).
### Figure 5

**Heatmap of Top 25 General Co-occurrences**

![Heatmap](image-url)
Here is the ranking list of the top 25 co-occurrences in general across the entire dataset:

1. Integration Cura personalis/Magis (Gr=985): 10784 occurrences
2. Cura personalis (Gr=809): 10060 occurrences
3. Magis (Gr=600): 8545 occurrences
4. Holistic development (Gr=493): 7123 occurrences
5. Jesuit education (Gr=510): 7078 occurrences
6. Human development (Gr=486): 7021 occurrences
7. Educational policies and practices (Gr=526): 5683 occurrences
8. Ignatian discernment (Gr=300): 4997 occurrences
9. Service to others and common good (Gr=290): 4774 occurrences
10. Ignatian spirituality (Gr=287): 4771 occurrences
11. Incarnational emphasis (Gr=343): 4447 occurrences
12. Religion/Spirituality (Gr=323): 4154 occurrences
13. Education factors (Gr=253): 3973 occurrences
14. Student development (Gr=175): 2748 occurrences
15. Jesuit education: JE Identity (Gr=160): 2563 occurrences
16. Magis as discernment toward the common good (Gr=144): 2537 occurrences
17. Community engagement (Gr=149): 2464 occurrences
18. Social engagement (Gr=184): 2310 occurrences
19. Jesuit education: Care for individuals/Cura Personalis (Gr=147): 2290 occurrences
20. Religion/Spirituality: Religious/Spiritual identity (Gr=152): 2155 occurrences
21. Educational practices (Gr=214): 1950 occurrences
22. Education and social issues (Gr=147): 1883 occurrences
23. Learning and development (Gr=119): 1856 occurrences
24. Jesuit education: Humanistic education (Gr=79): 1383 occurrences
25. Jesuit education: Development of the whole person (Gr=61): 1138 occurrences

Since the entire code system was hermeneutically built, I preferred to understand the strength of the relationships in practical terms, focusing on strong correlations. Before moving to Figure 4, it is important to note that not all variables present in the code system met the threshold of 0.6. Therefore, the following analysis is based on variables within the code system after code co-occurrences. The hierarchy’s symbology is: Theme:, +Category, -Sub-category, and *Code.
Table 2

**Code System Comparative**

<table>
<thead>
<tr>
<th>Original Code System</th>
<th>Code System after Co-occurrences</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cura Personalis:</strong></td>
<td><strong>Cura Personalis:</strong></td>
</tr>
<tr>
<td>+Holistic Development</td>
<td>+Holistic Development</td>
</tr>
<tr>
<td></td>
<td>-Human Development</td>
</tr>
<tr>
<td>+Individual Attention</td>
<td></td>
</tr>
<tr>
<td>+Incarnational Emphasis</td>
<td>+Incarnational Emphasis</td>
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<tr>
<td></td>
<td>-Religion/Spirituality</td>
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<td>*Religious/ Spiritual</td>
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<td>Identity</td>
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<tr>
<td>+Social Engagement</td>
<td>+Social Engagement</td>
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<tr>
<td></td>
<td>-Education and Social Issues</td>
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<tr>
<td>+Integration of Faith and Education</td>
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<tr>
<td><strong>Magis:</strong></td>
<td><strong>Magis:</strong></td>
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<tr>
<td>+Striving for Excellence</td>
<td>+Striving for Excellence</td>
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<tr>
<td>+Service to Others and Common Good</td>
<td>+Service to Others and Common Good</td>
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<td>-Magis as discernment toward the</td>
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<td>common good</td>
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<td>-Community Engagement</td>
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<tr>
<td>+Ignatian Discernment</td>
<td>+Ignatian Discernment</td>
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<td></td>
<td>-Ignatian spirituality</td>
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<tr>
<td>+Continuous Improvement</td>
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<tr>
<td>+Contextual Application</td>
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<tr>
<td><strong>Integration of Cura Personalis and Magis:</strong></td>
<td><strong>Integration of Cura Personalis and Magis:</strong></td>
</tr>
<tr>
<td>+Decision-Making</td>
<td>+Decision-Making</td>
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<td>+Educational Policies and Practices</td>
<td>+Educational Policies and Practices</td>
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<td></td>
<td>-Education factors</td>
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<td>+Student Development</td>
<td>+Student Development</td>
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<td>-Learning and development</td>
</tr>
<tr>
<td>+Institutional Mission and Vision</td>
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<tr>
<td>+Jesuit education</td>
<td>+Jesuit education</td>
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<td></td>
<td>-JE Identity</td>
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<td>-Care for individuals/Cura</td>
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<td></td>
<td>Personalis</td>
</tr>
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<td></td>
<td>-Development of the whole person</td>
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<td></td>
<td>-Humanistic education</td>
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After adjusting for semantic hierarchy inside the code system, my focus was on finding thematic relationships by identifying a very high range of correlational values, with magnitudes between 0.9 and 1.0, among the top 25 co-occurrences organized within themes. Figure 6 presents the heatmap of those correlations grouped by themes and serves as the basis for the subsequent observations.
Thematic Relationships

The first fundamental cluster of correlations exists inside the category “+Jesuit education,” which is part of the theme “Integration of Cura Personalis and Magis.”

The relationship between the sub-categories "-JE Identity" and "-Care for
individuals/Cura Personalis” (0.97) is the highest. It is possible to read that, as part of the
definitions of Jesuit education, their nearly theoretical equivalence affirms that ‘cura
personalis’ is essential for the identity of Jesuit education.

Another set of very strong relationships appears in the sub-category “-Jesuit
education identity.” It relates to “-Humanistic education” (0.95) and “-Development of
the whole person” (0.94) to the point that it is possible to affirm that Jesuit education is
humanistic education that develops the whole person. This relationship is reinforced by
the double relationship “-Care for individuals/Cura Personalis” has with “-Development
of the whole person” (0.95) and “-Humanistic education” (0.94). The combination of
very strong relationships suggests that Jesuit education is all about student development
by taking care of developing the whole person and caring for each individual, which
includes the strong double relationship between “+Student development” with “Cura
Personalis” (0.94) and “-Development of the whole person” (0.93).

The next notable relationship is between two sub-categories of “+Service to
others and common good” within the theme Magis. The very strong connection between
“-Magis as discernment toward the common good” and “-Community engagement”
(0.96) presents the pragmatic approach of Jesuit education which envisions formation as
preparation for service to improve the human community.

These clusters of correlations with values over 0.94 highlight a very cohesive
approach. This thematic approach to ICAJE’s documents emphasizes the essential
integration of both the holistic development of the individual (cura personalis) and the
greater societal impact (magis).
It is notable the presence of an equal value of 0.92 for the strength of the relationship between a set of several variables grouped around Jesuit education identity, care for individuals or *cura personalis*, and educational factors. “-JE identity,” “-Educational factors,” and “-Magis as discernment toward the common good.” “+Care for individuals/Cura Personalis,” “-Educational factors,” and “+Student development” (0.92). Pivoting on educational factors, Jesuit education identity is closely associated with the discerned pursuit of the common good; as well, care for the individual is synonymous with the student’s fullest possible development. One could interpret these relationships as follows: educational factors, which foster students’ development by caring for individuals and discernment toward the common good, are crucial in shaping the identity of Jesuit education. In other words, factors related to *cura personalis* and *magis* play a central role in the identity of Jesuit education.

A correlation value of 0.91 is commonly found in several relationships. The relationship between "+Jesuit education" and "-Education factors" indicates that both definitions are intertwined with specific educational elements, with one of the most important being "*Reflection." The relationship between "-JE identity," "+Service to others and the common good," and "+Student development" shows that Jesuit identity is strongly linked to students’ growth and service, which further emphasizes the principles of *cura personalis* and *magis*. In the same manner, 0.91 strength of relationships exists between "+Humanistic education" and five other variables: "+Ignatian discernment," "-Ignatian spirituality," "+Service to others and the common good," "-Magis as discernment towards the common good," and "-Development of the whole person." This crucial connection puts in evidence the relationship between Jesuit education and Christian
Humanism. Jesuit education aims to shape the whole person towards practical civic commitment, which necessitates discernment for the common good. This aligns with the Ignatian spirituality's conception of the person and their mission. The relationship between "-Development of the whole person," “-Learning and development” and "-Magis as discernment towards the common good" (0.91) further highlights this connection.

A correlational value of 0.9 is common for various clusters of relationships. The very strong connection between “-Care for individuals/Cura Personalis,” “-Learning and development,” “+Service to others and common good,” and “-Magis as discernment toward the common good” shows that Jesuit education is characterized by facilitating knowledge gaining and personal growth, providing individuals an opportunity to pursue discerned service and the common good. The double-crossed connection between “+Ignatian discernment” and “-Ignatian spirituality” with “+Service to others and common good” and “-Magis as discernment toward the common good” evidences this connection between knowledge and service. Additionally, “+Student development” and “-Education factors” reinforce its centrality in Jesuit education. And the next set of very high relationships (0.90) further presents “-JE identity” closely connected with cura personalis and magis through the set of its components “+Holistic development,” “-Human development,” “+Community Engagement,” “+Ignatian discernment” and “-Ignatian spirituality.”

The data also show that, despite the strong relationships, theoretical affirmations are expressed more through educational policies than through concrete educational practices, which is to be expected due to the nature of the documents. The strength of correlation for “-Educational practices” (a sub-category of “+Educational policies and
practices”) varies in a range between 0.62 for addressing “Education and social issues” to 0.89 for considering “Educational factors.”

It is worth noting that the variable ”+Decision-making” is not in the list of variables with a median or strong relationship. The document CJE 143 explains how Ignatius and his companions made decisions based on a process of individual and communal discernment, always in a context of prayer. IPP 24 also mentions discernment as part of the Spiritual Exercises, reiterating Ignatius’s call to put love in deeds (paragraph 59), which requires reflection from a personal point of view (62) based on values (80) and consciousness about the motives that impels to (135) and fosters decision and commitment (60). In terms of decision-making, the basic call in IPP (151) is “to help students develop a commitment to apostolic action” by offering them opportunities to explore human values critically and to test their own values experientially.” Lastly, LT21 38 invites “to promote discernment as a regular habit for those who choose to follow Christ” with special emphasis on ecological care for our common home (46-49) and on collaboration (245), with emphasis on subsidiarity and decision-making based in light of the particular context. In general, there is a call to discern using Ignatian discernment as Ignatius and the first companions did, but there are no clear criteria for such discernment in terms of decision-making in Jesuit education beyond the list of 28 characteristics, the Ignatian Pedagogical Paradigm, and the 10 global indicators for Jesuit schools.

The correlation values also show how different educational categories and codes express "Cura personalis," "Magis," and their integration. To examine these relationships more closely within themes, I analyzed some trend patterns in co-occurrences using a heatmap that shows the top 10 correlations in each theme (Figure 7: Combined Heatmap
for Top 10 Co-occurrences Within the Themes “Cura Personalis,” “Magis,” and “Integration Cura Personalis/Magis”).

Figure 7

**Combined Heatmap for Top 10 Co-occurrences Within the Themes “Cura Personalis,” “Magis,” and “Integration Cura Personalis/Magis”**
In all themes, high correlation values indicate strong relationships between various aspects of the Jesuit educational framework. This suggests a cohesive and integrated approach within the themes. The variations in correlation values also highlight the nuanced differences in how these principles are manifested across various educational categories and codes.

Each theme has its own unique co-occurrences that define its specific focus. For example, the theme “Integration Cura personalis/Magis” results equally (0.82) strongly associated with “+Holistic development,” “-Human development,” “+Ignatian discernment,” and “-Ignatian spirituality.” And looking into the relationships inside “Integration Cura personalis/Magis,” “+Jesuit education” (0.89) appears strongly related to “+Educational policies and practices” (0.89) promoting “-Human development” (0.88), which is part of “+Holistic development” (0.88), and requires the use of “+Ignatian discernment” (0.88) based on “-Ignatian spirituality” (0.87) that promotes “Magis” (0.86) due to the “+Incarnational emphasis” (0.84) of an educational approach that rests on “-Religion/Spirituality” (0.84).

Similarly, “-Education factors” (a sub-category within “+Educational policies and practices” (0.82) that includes references to elements involved in education) appears highly related to “Jesuit education” (0.91), “+Holistic development” (0.88), “-Human development” (0.88), both part of “Cura personalis” (0.86), and with “+Service to others and the common good” (0.88), “Ignatian discernment” (0.86), “-Ignatian spirituality” (0.86) within “Magis” (0.86),“+Incarnational emphasis,” which is strongly related to “-Ignatian spirituality” and “+Ignatian discernment” (0.86), also shares the same relationship with “+Holistic
development,” “Human development,” “Jesuit education” (0.84), “Magis” (0.83) “Service to others and the common good” (0.82). These associations converge, for example, in IPP 14, where ICAJE affirms that education with an incarnational emphasis should aim at forming the whole human person, not just academically but emotionally and morally as well, which is a call to formation in human excellence. An excellence that reflects the mystery and reality of the Incarnation; a human excellence that reveres the dignity of all people and the holiness of all creation. And, since education alone does not lead to virtue, magis results essential to ensure that such education takes place within a moral and intellectual framework. In this educational context, teachers can and must guide students through an inquiry-based approach to tackle complex issues and values in life.

Each theme has its own unique co-occurrences that define its specific focus. For example, an "Incarnational emphasis" characterizes the theme of "Cura personalis," while "Magis" is defined by its focus on "Service to others and the common good." In the theme of "Integration Cura personalis/Magis," "Education factors" are central.

These patterns reflect how closely intertwined the themes of "Cura personalis," "Magis," and their integration are. They underscore Jesuit education’s holistic, value-driven, and continuous improvement-oriented ethos. Certain co-occurrences repeatedly appear across themes, highlighting their importance and pervasiveness in the Jesuit educational context.

The strong correlations found among the categories such as "Jesuit Education," "Holistic Development," and "Human Development" suggest that Jesuit education takes a blended approach to learn. This approach integrates spiritual, moral, intellectual, and
physical aspects of education. This integrated approach indicates that Jesuit education emphasizes a well-rounded formation that prepares students not just academically but also spiritually and ethically.

The central role of "Ignatian Discernment" and "Ignatian Spirituality" becomes evident through the frequent occurrence across various themes in the curriculum. This pervasive occurrence of themes highlights their significance in the educational ethos and implies that decision-making and spiritual development based on Ignatian principles are crucial components of the educational process. It helps to foster a unique Jesuit identity.

The prominence of categories like "Service to Others and Common Good" underscores the importance given to community engagement and service. This trend, particularly in the "Magis" theme, highlights the commitment to developing academically competent individuals and socially responsible and community-oriented ones. The focus on community and service emphasizes the value placed on shaping individuals who are committed to the common good.

The correlation between "Educational Policies and Practices" and various educational aspects indicates an adaptive and evolving educational framework. This suggests a call for a continuous effort to refine and update educational strategies, ensuring they remain effective and relevant.

In general, the most notable patterns within themes can be summarized:

- While some pairs show very high correlations (close to 0.9), others have moderate correlations (around 0.8). This variation suggests a range in the strength of association between different educational aspects.
• There are some common co-occurrences that appear in all three themes, including "+Holistic development," "-Human Development," "+Ignatian discernment," and "-Ignatian spirituality." These co-occurrences have strong relationships with "+Jesuit education" and its "+Educational policies and practices." This suggests that they are closely related and are likely to co-occur because they are central to the Jesuit educational philosophy. These aspects are important throughout various thematic areas, emphasizing their significance in the Jesuit educational framework.

• The co-occurrence of "Integration Cura personalis/Magis" in both "Cura personalis" and "Magis" themes highlights the interconnectedness of these two fundamental principles in Jesuit education.

• The presence of "Ignatian Discernment" and "Ignatian Spirituality" in high-correlation pairs across themes underscores the importance of these concepts in shaping the Jesuit educational experience. Not in vain, one of the framework documents is a guide for ongoing discernment (LT21).

• Elements such as "+Educational Policies and Practices" and "+Holistic development" appearing frequently suggest a strong emphasis on comprehensive educational approaches and imply continuous improvement within the Jesuit educational framework.

• The "Cura personalis" principle in Jesuit Education focuses on holistic development and comprehensive educational approaches. This principle correlates with "Magis," which emphasizes service to others and community engagement.
The integration of these two principles in educational policies and practices signifies a commitment to care and the greater good.

- Each theme has unique co-occurrences that define its focus. The concept of "Cura Personalis" in Jesuit Education is closely interrelated with "Educational Policies and Practices" and "Holistic Development," emphasizing a comprehensive approach to education. In the context of "Magis," this concept is correlated with "Service to Others and Common Good," highlighting the importance of engaging with the community through service. The integration of "Cura personalis" and "Magis" is reflected in the strong correlation between these two foundational principles and "Educational Policies and Practices," emphasizing the holistic integration of care and the greater good in educational policies.

The analysis of patterns within themes points out some implications in the current framework for Jesuit education produced by ICAJE:

- The emphasis is on well-rounded development: The intertwining of academic, spiritual, and social elements fosters a comprehensive development of students, preparing them for diverse life challenges.

- Ethical and moral guidance is essential: The emphasis on Ignatian principles provides a strong ethical and moral foundation, encouraging students to make choices that are beneficial for themselves and the greater good of the human community.

- Community impact is always in sight: By emphasizing service and community engagement, graduates are likely to contribute positively to society, embodying
competence, consciousness, compassion, and commitment or social responsibility.

- It is a proposal for responsive education: The dynamic nature of educational policies and practices ensures that the curriculum remains responsive to changing societal needs and educational paradigms, maintaining the relevance and effectiveness of Jesuit education. In sum, these trends highlight the unique aspects of Jesuit education, characterized by its integrative approach, ethical grounding, community focus, and adaptability. They reflect an educational model that seeks to develop well-rounded individuals equipped to navigate and contribute positively to an increasingly complex world.

In conclusion, the identified patterns reflect a strong interconnectedness between key aspects of the Jesuit educational philosophy. The recurring presence of specific categories across themes suggests a cohesive, integrated approach where personal development, community service, and holistic education are deeply intertwined. The variations in correlation strength across different pairs also highlight the diverse ways in which these principles manifest within the current Jesuit educational framework. Four core interrelationships encapsulate these fundamental findings:

1. Integration of “Cura Personalis” and “Magis:” This theme is strongly associated with holistic development, Ignatian discernment, and Ignatian spirituality. This signifies the deep interconnection between personal care, ethical and spiritual formation, and the pursuit of the greater good in Jesuit education.

2. Holistic Development and Educational Policies: Frequent co-occurrences of holistic development and educational policies suggest a strong emphasis on
comprehensive educational approaches, reflecting the Jesuit commitment to the well-rounded development of students.

3. Service to Others and Community Engagement: The prominence of service and community engagement, especially in the “Magis” theme, underscores the importance Jesuit education places on developing socially responsible individuals.

Finally, 4. Ignatian discernment and spirituality are frequently occurring themes, highlighting their central role in the educational ethos and decision-making processes within Jesuit schools. This reflects the unique identity of Jesuit education, which integrates intellectual, spiritual, and moral education.
CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

This dissertation embarked on a scholarly journey to illuminate the core principles and purposes of Jesuit education, seeking to establish essential criteria for effective decision-making within this venerable educational tradition. Anchored in a comprehensive analysis of contemporary documents from the International Commission for the Apostolate of Jesuit Education (ICAJE), this study delved into the rich tapestry of Jesuit educational philosophy, tracing its roots to Renaissance Christian humanism, the *modus parisiensis*, and the Spiritual Exercises of Ignatius of Loyola. The exploration was guided by a quest to understand how Jesuit education, while preserving its time-honored traditions, continues to evolve and respond dynamically to modern educational needs and contexts. Through this investigation, the dissertation aimed to contribute to the ongoing discourse on Jesuit education by articulating a set of fundamental criteria rooted in the ethos of 'cura personalis' and 'magis,' ensuring that decision-making in Jesuit institutions remains aligned with their core mission and values.

Summary of the Study's Purpose and Methodology

The current framework for Jesuit education does not prescribe curricula, like the *Ratio Studiorum*, but rather emphasizes the importance of responding to the needs of the context combining academic excellence with spiritual and civic values. This requires ongoing discernment.

The current framework documents present 28 general characteristics of Jesuit education (ICAJE, 1986a), present an Ignatian pedagogical paradigm (ICAJE, 1993), and posit 10 global identifiers for Jesuit schools (ICAJE, 2019). Universities in North
America may consider 7 additional characteristics for higher education as proposed by Garanzini and Baur (2022). All together plus the “Universal Apostolic Preferences” (Sosa, 2019a) are supposed to guide such a discernment. However, using a wide range of documents and elements for decision-making may complicate the reflection process and lead to criteria fragmentation when facing the context’s pressing demands. To avoid this, it is helpful to identify a set of fundamental criteria that pivot and streamline the discernment process.

It is crucial to establish a set of clear criteria when making decisions. However, this does not imply oversimplifying fundamental principles or assuming that it will resolve all problems related to choices that are not aligned with shared values. For Jesuit schools to provide authentic Jesuit education, they must possess certain characteristics and meet specific indicators. Nonetheless, using fundamental criteria can help to converge the decision-making process and guarantee that the essential features and ethos are embodied and the purpose is fulfilled.

This study primarily conducted a detailed qualitative content analysis of the Jesuit education framework and extracted the underlying principles of ‘cura personalis’ and ‘magis’ as pivotal elements within the Jesuit educational model. The thematic analysis presented in Chapter 4 reveals a strong interconnectedness between key aspects of the Jesuit education as presented in the current framework. The presence of specific categories across themes shows a cohesive and integrated approach, where personal development, community service, and holistic education are deeply intertwined. The diverse ways in which these principles manifest within the current Jesuit educational framework are highlighted through variations in theme correlations. The thematic
analysis showed that Jesuit education revolves around four key topics: 1) Integrating personal care, ethical and spiritual formation, and the pursuit of the greater good; 2) Emphasizing comprehensive educational approaches for well-rounded student development; 3) Prioritizing service and community engagement to foster social responsibility; and 4) Highlighting the central role of Ignatian discernment and spirituality in decision-making processes.

The significance of Ignatian discernment and spirituality in Jesuit education is highlighted by their frequent appearance in various themes. This underscores their crucial role in the decision-making processes and educational ethos. To practically implement this, teaching methods that promote critical thinking, reflection, and ethical decision-making, along with the creation of a school environment that encourages spiritual growth and development, are necessary.

As previously defined, 'cura personalis' refers to the holistic care for the formation of the entire person within the human community, while 'magis' refers to the continuous discerned striving for the greater good. Therefore, by integrating those definitions with the thematic analysis results, the different aspects of the Jesuit educational framework appear strongly related, indicating a cohesive and integrated approach around the two themes/principles. The Jesuit educational model places great importance on the overall development of students. It does this by integrating academic, spiritual, and social elements, which altogether promote extensive personal growth and prepare students to face diverse challenges in life. The model also focuses on ethical and moral guidance based on Ignatian principles to encourage students to make decisions that benefit both themselves and the wider human community. Furthermore, the curriculum
emphasizes service and community engagement, ensuring that well-educated graduates contribute positively to society with conscious, compassionate, committed service to the community in pursuit of the greater good. The current framework presents Jesuit education as dynamic and adaptable, allowing educational policies and practices to remain responsive to changing societal needs and educational paradigms, ensuring the relevance and effectiveness of Jesuit education in a rapidly evolving world.

This study has shown that Jesuit education is guided by two fundamental principles, namely 'cura personalis' and 'magis.' These principles form the core identity of Jesuit education and must be used as the basis for decision-making. By adhering to these principles, it is possible to create a coherent educational framework that is based on the essential elements and ethos of Jesuit education. This is not a simplification but rather an affirmation of the fundamental principles that define Jesuit education.

Incorporating 'cura personalis' and 'magis' into Jesuit educational settings requires decisions leading to the creation of an environment that prioritizes the holistic growth of students, including academic rigor, spiritual and ethical formation, opportunities for commitment to community service, and the formation of abilities to engage in the discerned pursuit of the greater good while adapting and thriving in a constantly changing world. Such an approach ensures that Jesuit education remains relevant and effective, preparing students to become well-rounded individuals, 'men and women for others,' who are competent, conscious, compassionate, and committed to bringing justice in response to the faith that guides their lives.
Significance

This exploratory thematic qualitative content analysis of the Society of Jesus’s contemporary education documents aimed to articulate the fundamental elements of the criteria for decision-making that could enhance the continuum of Jesuit education. This essential core for discernment could help Jesuits and educators center conversations on the continual *cura personalis* that this humanistic *living tradition* requires beyond sharing good practices. Attaining this study’s purpose could also help orient collaborations toward a more coherent Jesuit education performance, which implies the exercise of *magis* as the principle driving persons and Jesuit institutions toward ‘a more universal good.’ Finally, this research aspired to provide educational theorists and practitioners in the field with essential criteria to enhance discernment on how to organize curricula and institutions more effectively to facilitate a more coherent experience of humanistic education in all Jesuit schools.

Decisions based on ‘cura personalis’ and ‘magis’ will align and strengthen our educational ethos focused on human development and transformative change for the human community, preserving the Jesuit tradition and ensuring internal coherence and equity. Such education can also promote social change. After all, it is the permanent combination of both fundamental principles that ties together the *why* and the *what for* of Jesuit education and sheds light to choose the *how* or the means that better help to attain the purpose of forming ‘men and women for others and with others,’ persons of human excellence who embody ‘*docta pietas*’ and ‘*vita civilis*’ with proven professional competence, social and spiritual consciousness, profound compassion, and passionate commitment ‘to love and serve in everything.’ In short, it is an education that equips
people to live to the fullest of their potential while using their talents for the common good. As a Jesuit educator, I am excited to witness and be a part of this transformative journey in our schools.

Despite this attempt’s exploratory nature, this study bridges essential concepts and practices integral to the Jesuit educational ethos, reflecting its humanistic tradition. A thorough analytic exercise of interpreting the sources and guidelines for Jesuit education today could never claim to be a final interpretation. Instead, the non-conclusive nature of this qualitative inquiry opens possibilities to use it as part of the hermeneutical circle of creative fidelity that drives this living tradition of Jesuit education. The dissertation is intended as a collaborative effort, contributing another voice in the dialogue towards aligning the continuum of ‘cura personalis’ with ‘magis.’ These principles, as understood and employed in this study and within the Society of Jesus, emerge as crucial characteristics of Jesuit education and are presented as influential for every academic decision, pedagogical adaptation, and innovation in various contexts. Additional limitations and methodological and interpretative flaws could have exposed my personal constraints, but generous mentors helped me walk the rigorous inquiring line.

**Limitations and Future Research**

This study's reliance solely on documentary sources, while invaluable, limits the breadth of perspectives typically gained from a more diverse source base. The thematic qualitative content analysis was confined to a select group of documents, representing the contemporary global framework of Jesuit education produced by the International Commission for the Apostolate of Jesuit Education (ICAJE). Even though, as part of the
hermeneutic approach, those documents were read in the light of the foundational sources for Jesuit education.

While these documents provide a foundational and authoritative perspective, this approach may have omitted the rich insights that could be garnered from empirical studies or direct observations in educational settings. Notably, recent academic discussions and alternative viewpoints were not explored, particularly those not formally embraced within the current official framework. This exclusion potentially narrows the study's scope, leaving out emergent ideas and practices in the field.

Future research could broaden this scope by integrating empirical methodologies, incorporating direct observations, and engaging with a wider range of academic literature. This would offer a more holistic view of Jesuit education as it is practiced and perceived in various contexts.

A key area for future exploration is the practical application of Jesuit educational principles, specifically 'cura personalis' and 'magis,' across diverse educational contexts. It would be beneficial to investigate how these principles are implemented and experienced in different Jesuit schools, taking into account various cultural, socio-economic, and geographical factors.

Further, there is an opportunity to engage more deeply with the voices of those who are directly involved in implementing Jesuit education – educators, administrators, and students themselves. Their insights and lived experiences are critical in understanding the practical challenges and opportunities of applying Jesuit principles in education.
A potential direction for future research is to explore how Jesuit educational values can be consistently integrated across the entire educational spectrum, from kindergarten through higher education (K-20). This involves examining how these values are understood by stakeholders and influence educational policies, curriculum development, and pedagogical practices, ensuring a seamless Jesuit educational journey.

In summary, while this study provides a foundational understanding of Jesuit educational principles from official documents, future research should aim to expand this view by incorporating empirical studies and diverse perspectives. This will enable a more comprehensive understanding of how Jesuit education is practiced and evolves in different contexts worldwide, which will provide better insights for maintaining the ethos of this living tradition.

**Concluding Thoughts**

This dissertation underscores that, in Jesuit education, discernment transcends mere decision-making. Rooted in the Ignatian tradition, discernment is an intricate process of selecting the most fitting path among several beneficial options. This process extends beyond a simplistic choice model, like flipping a coin, demanding a nuanced evaluation of various possibilities against established professional criteria. Such criteria should align with the unique needs and context of the educational setting and its students and with the ultimate purpose of Jesuit education while preserving its fundamental features.

The Jesuit education tradition emphasizes the importance of ongoing discernment and professional competence when selecting means. This approach involves a meticulous analysis of all potential choices, with the aim of identifying the one that best aligns with
the desired educational outcomes. In situations where multiple options seem equally viable, mere administrative or efficiency-based criteria fall short. Decisions within Jesuit education must pivot around the comprehensive development of individuals, emphasizing their integration into the community and nurturing their commitment to contribute towards the greater good. This holistic approach necessitates the application of the same fundamental criteria to 'cura institutionalis' – a consideration for the welfare of the entire institution, ensuring decisions are made within the broader institutional context and ethos.

Ultimately, my aspiration is that this study contribute to refining the discernment process in Jesuit education, integrating 'cura personalis' and 'magis' as central tenets. This integration should guide educators and administrators in making decisions that not only foster individual growth but also serve the universal good, resonating with the maxim 'ad majorem Dei gloriam' (for the greater glory of God). The insights gained from this research aim to provide a blueprint for educational theorists and practitioners, promoting a holistic educational approach consistent with the Jesuit mission. The focus is not only on nurturing each student's unique journey ('cura personalis') but also on inspiring a pursuit of 'magis'—the greater good.

If a coin were to be flipped for discerning in Jesuit schools, it should have the following descriptions on each side to aid in decision-making aligned to the principles and purpose of Jesuit education: *Cura personalis* - How does this contribute to the overall development of the person/institution? *Magis* - How will this help the person/institution contribute to the greater good?
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