

Comprehensive Novitiate Formation Program

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ABSTRACT

This study presents a comprehensive novitiate formation program for the Carmelite Sisters of Our Lady (Carm.O.L.), grounded in the principles of Appreciative Inquiry (AI) and aligned with the congregation's Constitution and Book of Life. Recognizing the effects of secularization and globalization on religious vocations, the proposed program aims to strengthen the holistic development of novices through the integration of human, spiritual, community, congregational, and apostolic dimensions. Using AI's 4-D cycle—Discovery, Dream, Design, and Destiny—the study identifies life-giving factors in the existing formation program and transforms them into an enriched framework that fosters maturity, self-awareness, and authentic commitment to religious life. Through the use of appreciative dialogue, reflective practices, and experiential learning, the formation process emphasizes growth in faith, interior freedom, and discernment of vocation. The program ultimately seeks to form women of prayer and mission who embody the Carmelite charism of being life-givers and life-blessings, rooted in contemplation, community, and apostolic zeal inspired by Mary and Elijah.

Keywords: novitiate formation, Appreciative Inquiry, Carmelite spirituality, religious life, human and spiritual development

Date Submitted: July 30, 2025

Date Accepted: September 2, 2025

Date Published: October 1, 2025

INTRODUCTION

The youth of today who are called by God to the religious life possess deep desires and aspirations for authenticity, fellowship, and solidarity. They yearn for a world that reflects justice, peace, and the dignity of all creation, displaying a passion for freedom and authenticity as they pursue meaningful participation in the transformation of society. Their enthusiasm for causes such as the liberation of humanity from oppression, the promotion of human rights, and

DOI: <http://doi.org/10.69651/PIJHSS0403483>

Recommended citation:

Sanchez, R. L. (2025). Comprehensive Novitiate Formation Program. *Pantao (The International Journal of the Humanities and Social Sciences)* 4 (4), 5206-5214. <http://doi.org/10.69651/PIJHSS0403483>

the conservation of nature reveals their genuine search for purpose and service in the contemporary world. However, these ideals and spiritual inclinations must be properly cultivated and evangelized, especially in an era characterized by the forces of secularization and globalization, which often distort spiritual values and threaten the sanctity of religious vocation by prioritizing temporal concerns over divine communion and fraternal love.

Recognizing these challenges, Pope John Paul II consistently emphasized throughout his pontificate the need for religious formation programs that adapt to the changing contexts of modern society while preserving fidelity to the Church's mission and the charism of each institute. He urged that formation should respond to the mentality and conditions of the younger generations, ensuring that candidates are prepared for the demands of apostolic service without compromising the spiritual integrity of their vocation. The renewal of religious communities, therefore, depends largely on the quality of formation that their members receive. As articulated in Church teachings, true formation introduces candidates into the life and spirit of their institute, harmonizing the spiritual, apostolic, doctrinal, and practical elements of their lives so that they may embody the unity of life in Christ through the Holy Spirit.

Formation, moreover, is not a static process but a lifelong journey of conversion and integration. It encompasses the total growth of the person—human, spiritual, emotional, physical, and social—by awakening the individual's awareness of God's transforming presence and fostering openness to the movement of the Holy Spirit. Within the congregation of the Carmelite Sisters of Our Lady (Carm.O.L.), formation serves as an essential means by which candidates respond freely and lovingly to God's call. Guided by St. Paul's exhortation to offer oneself as "a living sacrifice, holy and pleasing unto God" (Romans 12:1), the congregation aims to form Christ-centered women who are both contemplative and apostolic, embodying the Carmelite spirit of being "life-givers and life-blessings" (Constitution, ch.5, art.50) and living out the prophetic call to "act justly, love tenderly, and walk humbly with God" (Micah 6:8).

The Carm.O.L. formation process is holistic and anchored in what the author identifies as the threefold hierarchy of calls: becoming a human person, deepening one's faith, and responding to the vocation of religious life. The first two stages—human development and faith formation—constitute the foundation for the authentic response to God's invitation to consecrated life. To become truly human entails self-knowledge, emotional maturity, and awareness of one's strengths, weaknesses, relationships, and inner motivations. Such awareness enables discernment of the Holy Spirit's guidance and prepares the person to embrace faith more deeply. This process fosters recognition of three key spiritual values: *Capax Dei* (the capacity for God), responsible freedom, and the courage to accept the demands of divine sonship. When these foundational dimensions are properly formed, the individual can respond to the call to religious life freely, lovingly, and maturely, integrating the psychological, social, and spiritual aspects of one's being in harmony with divine purpose.

The author, drawing from her personal and formative experience at the Asian Religious Formation Institute (ARFI) in Antipolo City, affirms the transformative power of this integrative approach. During her eight-month residential formation, she experienced deep spiritual renewal by confronting both her strengths and vulnerabilities—embracing joy and pain, wholeness and brokenness—as moments of divine encounter. She came to understand that conversion is a continuous process of allowing the Holy Spirit to transform the self into God's likeness through the Carm.O.L. way of living: being a woman of prayer and mission, a life-giver, and a life-

blessing. Her experience resonates with Aman Motwane's insight that "when you change how you see the world, your whole world changes," highlighting the inner transformation that authentic formation brings.

Inspired by these insights, the author proposes an enriched novitiate formation program for the Carmelite Sisters of Our Lady. Grounded in the congregation's Constitution and Book of Life, the program integrates the principles of Appreciative Inquiry (AI) and selected concepts from the Blondin Organizational Planning System (OPS). This synthesis aims to identify and amplify life-giving elements within the formation process, fostering renewal that is faithful to tradition yet responsive to contemporary needs. The author hopes that this framework will assist future formators and novices in deepening their understanding of religious formation as a dynamic process of growth in humanity, spirituality, and mission. Ultimately, the enriched program seeks to guide candidates toward authentic discipleship and community living, ensuring that the Carm.O.L. formation remains both contextually relevant and spiritually transformative in today's evolving world.

Statement of the problem

This study aimed to develop an enriched novitiate formation program for the Carmelite Sisters of Our Lady (Carm.O.L.) using the Appreciative Inquiry (AI) approach as a framework for renewal and transformation. The purpose of the study was to identify and enhance the life-giving elements of the existing novitiate formation process to make it more responsive to the human, spiritual, community, congregational, and apostolic needs of the novices, while remaining faithful to the charism and spirituality of the congregation. Specifically, it sought to answer the following questions:

1. What are the existing practices and components of the novitiate formation program of the Carmelite Sisters of Our Lady in terms of the human, spiritual, community, congregational, and apostolic dimensions?
2. What are the life-giving factors in the existing novitiate formation program that contribute to the growth and maturity of the novices across the identified dimensions?
3. What challenges are encountered by the formators and novices in implementing the existing novitiate formation program in relation to the human, spiritual, community, congregational, and apostolic dimensions?
4. Based on the Appreciative Inquiry framework, how can the identified life-giving factors and challenges be synthesized to formulate possibility statements for the development of an enriched novitiate formation program?
5. What enriched novitiate formation program can be proposed for the Carmelite Sisters of Our Lady that integrates the Appreciative Inquiry approach to strengthen human and spiritual formation, deepen community life, and enhance apostolic commitment?
6. What implementation plan and evaluative mechanisms can be designed to ensure the sustainability, adaptability, and continuous improvement of the enriched novitiate formation program for the Carmelite Sisters of Our Lady?

METHODOLOGY

This study employed a qualitative-descriptive developmental research design utilizing the Appreciative Inquiry (AI) approach as the primary framework for analysis and program development. The approach was selected to promote a positive and life-giving exploration of the novitiate formation process of the Carmelite Sisters of Our Lady (Carm.O.L.), with a focus on identifying existing strengths, best practices, and formative experiences that contribute to the human and spiritual maturity of the novices. The ultimate objective was to design an enriched novitiate formation program that responds effectively to the demands of contemporary religious life while remaining faithful to the congregation's charism, spirituality, and mission.

The Appreciative Inquiry framework, originally developed by Cooperrider and Srivastva, was adapted to suit the context of religious formation by emphasizing dialogue, discovery, and renewal within both organizational and spiritual systems. To strengthen its strategic and practical dimensions, the approach was integrated with the Blondin Organizational Planning System (OPS), ensuring that the process remained participatory, holistic, and rooted in the lived experiences of the members of the congregation. Rather than focusing on deficiencies or problems, the Appreciative Inquiry method encouraged the discovery of factors that give life and vitality to the novitiate community, recognizing that growth and transformation are best achieved through the appreciation of what is already functioning well.

The research process followed the four phases of the Appreciative Inquiry 4-D Cycle, beginning with the Discovery phase, which involved identifying and documenting the "life-giving factors" present in the existing novitiate formation program. Data were collected through interviews, reflections, and dialogue sessions with novices and formators to capture peak experiences and successful practices across five dimensions of formation: human, spiritual, community, congregational, and apostolic. The Dream phase followed, during which participants envisioned the ideal novitiate experience by reflecting on the insights gathered during discovery. From these reflections, possibility statements were formulated to express the participants' aspirations for a more dynamic and spiritually grounded formation process.

In the Design phase, the researcher collaborated with the formation team to co-construct the enriched novitiate formation program based on the possibility statements. This phase involved integrating the core elements of the congregation's Vision-Mission, Constitution and Book of Life, and relevant Church documents, including *Perfectae Caritatis* and the Directives on Formation in Religious Institutes. The design emphasized a balance of the human, spiritual, community, congregational, and apostolic dimensions through a structured two-year formation plan. The final stage, the Destiny phase, focused on the implementation and sustainability of the proposed program. This stage established clear goals, objectives, performance indicators, and practical actions for each dimension, ensuring continuity, accountability, and adaptability in the formation process. It also included provisions for periodic evaluation and reflection to sustain renewal in alignment with the guidance of the Holy Spirit.

The study's participants included the researcher, who had previously served as a Novice Directress of the Carm.O.L., along with current and former novices and formators who contributed experiential insights into the formation process. Data collection techniques included structured interviews, focus group reflections, and documentary reviews of the congregation's

Constitution, Book of Life, and relevant ecclesial and theological sources. Ethical considerations were observed throughout the study, ensuring respect, confidentiality, and voluntary participation among all respondents.

Data analysis followed a thematic synthesis approach grounded in the principles of Appreciative Inquiry, focusing on positive discourse and highlighting themes related to vitality, faith, relational harmony, and holistic growth. Responses were organized according to the five formation dimensions, from which recurring patterns and insights were identified. These emergent themes served as the foundation for developing possibility statements that guided the creation of the enriched formation program. The culmination of this process was the development of the Comprehensive and Enriched Novitiate Formation Program for the Carmelite Sisters of Our Lady—a framework that integrates the principles of Appreciative Inquiry to form women who are life-givers and life-blessings, embodying prayer, mission, justice, tenderness, and humility in their vocation and service to God.

RESULTS AND DISCUSSION

This study involved a total of ten participants composed of current and former novices and formators of the Carmelite Sisters of Our Lady (Carm.O.L.), including the researcher who had previously served as Novice Directress. Data were gathered through structured interviews, focus group reflections, and documentary reviews of the congregation's Constitution, Book of Life, and other ecclesial references. The findings were organized and analyzed using the Appreciative Inquiry (AI) framework, which emphasized identifying life-giving factors, best practices, and areas of growth within the novitiate formation process. Guided by the four phases of AI—Discovery, Dream, Design, and Destiny—the results revealed that the formation of the Carmelite Sisters of Our Lady is a holistic and lifelong process that integrates human, spiritual, community, congregational, and apostolic dimensions, fostering the continual transformation of candidates through the guidance of the Holy Spirit.

Human dimension – formation toward self-integration and authenticity

The human dimension emerged as the cornerstone of the novitiate formation process. Data revealed that the novitiate serves as a “school of self-knowledge,” where each candidate gradually learns to recognize her strengths, weaknesses, and emotional tendencies in the light of faith. Participants described their experiences of formation as a process of becoming fully human—cultivating self-awareness, self-acceptance, and maturity in dealing with others. The formators observed that the daily rhythm of discipline, silence, and reflection promotes inner freedom and authenticity, enabling the novices to confront their limitations while appreciating their God-given potential. As one novice explained, community life becomes the “mirror of self,” a space where one's pride, impatience, and vulnerability are reflected back, fostering humility and compassion.

These findings affirm the assertion of Pastores Dabo Vobis (1992) that human formation is the foundation upon which spiritual and apostolic formation rests. The study found that the existing formation program already incorporates psycho-emotional guidance and personal

mentoring; however, participants expressed the need for more structured sessions on affective maturity, emotional regulation, and interpersonal communication. The enriched formation program thus includes additional modules on responsible freedom, human relationships, and personality integration, ensuring that every novice attains holistic growth as a human person created in God's image and capable of authentic love and service.

Spiritual dimension – deepening the journey of faith and God encounter

In the spiritual dimension, the participants consistently identified prayer, contemplation, and silence as the essential elements of novitiate life. The daily rhythm—consisting of the Eucharist, Liturgy of the Hours, meditation, and Marian devotions—was described as “the heartbeat of formation.” Both novices and formators testified that the novitiate fosters a sacred rhythm that allows each member to encounter God in the ordinary and to deepen her relationship with Him through prayerful listening. However, participants also shared that sustaining interior silence in a world influenced by digital distractions remains a constant challenge.

The formators emphasized that prayer must be rooted in Scripture and the Eucharist, guiding the novices to discern God's will in their daily lives. The study recommended the integration of *Lectio Divina* and Ignatian discernment exercises to enhance the contemplative dimension of the program, allowing novices to internalize the Word of God and to live out their faith through concrete acts of love. This finding echoes *Vita Consecrata* (1996), which stresses that consecrated life must be centered on communion with Christ through prayer and Scripture. The spiritual formation of the novices is therefore not confined to devotional practices but aims at transformation—a movement from self-centered prayer to mission-oriented spirituality that nurtures women who are truly “life-givers and life-blessings.”

Community dimension – living fraternity in diversity and communion

Community life emerged as one of the most formative experiences in the novitiate, serving as the arena where human and spiritual growth converge. Participants described the novitiate community as “a family in formation,” where each member learns to live out the values of shared responsibility, obedience, and love. Living together was portrayed as both a joy and a challenge, as it exposes one's weaknesses while also cultivating patience, understanding, and compassion. Formators noted that community life provides a concrete setting where humility and charity are tested daily, as novices learn to accept correction, practice forgiveness, and value differences.

Through shared chores, prayer, recreation, and apostolic work, the novices internalize the Carmelite spirit of communion. However, challenges such as interpersonal conflicts and lack of emotional communication skills were also noted. These highlight the need for structured formation on empathy, conflict resolution, and community dialogue. The findings affirm *Perfectae Caritatis* (1965), which teaches that authentic consecrated life is rooted in fraternal charity and communal witness. To address this, the enriched program includes team-building activities, collaborative reflections, and regular community dialogues that reinforce the values of mutual respect and unity in diversity.

Congregational dimension – deepening identity and charism

The study revealed that a profound understanding of the Carmelite charism, defined as being “life-givers and life-blessings,” is central to the novices’ formation and sense of mission. Through the study of the Constitution and Book of Life, the novices gained an intellectual and spiritual appreciation of their congregation’s history, Marian spirituality, and contemplative-apostolic identity. However, both novices and formators recognized that this understanding must transcend theoretical knowledge and be lived through concrete expressions of faith and service.

To bridge this gap, the enriched novitiate formation program integrates experiential learning, reflective sessions, and apostolic immersions that allow the novices to embody the congregation’s charism in real-life contexts. Ongoing mentorship and spiritual accompaniment were also recommended to help them internalize the congregation’s values as women of prayer and mission. This initiative aligns with *Evangelii Gaudium* (2013), which calls on religious institutes to form missionary disciples who embody joy, faith, and service. By rooting formation in charism, the program seeks to ensure that the novices’ identity as Carmelite Sisters of Our Lady remains strong, relevant, and life-giving.

Apostolic dimension – commitment to service and mission

The apostolic dimension of the novitiate formation emerged as a powerful expression of faith in action. Participants shared that apostolic exposures—such as catechetical instruction, parish assistance, and outreach to the sick—serve as opportunities to integrate prayer with service. These experiences were described as moments of encountering Christ in others, particularly in the poor and the suffering. The novices reported that these pastoral involvements deepen their compassion and help them see their vocation as participation in Christ’s redemptive mission.

Nevertheless, the study identified the need for clearer coordination and spiritual accompaniment during apostolic assignments to prevent exhaustion and maintain reflective integration. The enriched program addresses this by introducing guided reflections, spiritual journaling, and debriefing sessions with formators after apostolic work. This enhancement reflects *Apostolicam Actuositatem* (1965), which stresses that authentic apostolic activity must spring from prayer and lead back to prayer. The findings affirm that apostolic work, when integrated with spirituality, becomes not merely an obligation but a contemplative act of love and witness to the Gospel.

Synthesis of findings and development of the enriched formation program

The synthesis of findings across the five dimensions revealed that the existing novitiate formation program of the Carmelite Sisters of Our Lady possesses many life-giving elements that nurture the human and spiritual growth of the novices. However, there remains a need to strengthen the integration between personal development and spiritual formation, deepen community life, and embody the congregation’s charism through concrete missionary engagement.

Through the Dream and Design phases of Appreciative Inquiry, participants envisioned the novitiate as a “school of the heart”—a community that forms women who are contemplative yet active, prayerful yet engaged, deeply human yet divinely inspired. The resulting enriched novitiate formation program incorporates structured human development modules, renewed prayer and discernment practices, community-building activities, charism-based lessons, and guided apostolic experiences. Finally, the Destiny phase emphasized sustainability and continuity by introducing formative evaluation and feedback mechanisms to ensure that the program remains dynamic, Spirit-led, and faithful to the congregation’s mission. Ultimately, the results affirm that the true transformation of religious life begins not in fixing weaknesses but in nurturing and amplifying what is already life-giving—a principle that lies at the heart of Appreciative Inquiry and reflects the Carmelite vocation to be, in all things, life-givers and life-blessings.

CONCLUSION

Every stage of formation of religious life is to be provided with a program which encompasses the formands’ whole life. It is always the formation program that serves as the pointers, and guiding star and determines the kind of renewal that the religious institute desires and the kind of members they will have in the future.

Appreciative Inquiry (AI) approach and framework had an impact to the writer. She is appreciating better the community members and the formation program of the Carmelite Sisters of Our Lady Novitiate. She has seen that there were so much life-giving factors present in the people as well as in the formation program that had been of great help to the community which are taken for granted in a way. There are so many wonderful things that Appreciative Inquiry offers to those whose paradigm has shifted and discovers unlimited possibilities of individuals.

After experiencing the process of doing this proposed enriched program by re-envisioning the formation in the novitiate, and used the Appreciative Inquiry approach; the writer has a sense of fulfillment and happiness of seeing the life-giving factors in the novitiate that were not fully considered, appreciated and celebrated. She believes that those life-giving factors brought life, vitality and grace to the community. Only, one has to have an appreciative eye to see the wonder and beauty of those life-giving factors.

With this, the writer is truly happy to do this program which she hopes will serve as a tool in the doing formation. Moreover, she is hoping that this proposed enriched program for the novitiate formation will greatly help the Formators in their work.

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