THE TEACHING OF SPIRITUALITY IN THE FORMATION PROGRAMMES OF RELIGIOUS ORDERS

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THE SPIRITUAL FORMATION of those entering religious life has a rich tradition in the Church and contains valuable insights for today's challenge of teaching spirituality. In this article, I would like to share the underlying assumptions about spiritual growth and development that influenced my six-year experience as a director of novices of Jesuits. While this article will reflect Jesuit documents and my own experience working in a Jesuit context, I am hopeful that other religious groups of men and women can discover in my comments what is universally true and helpful for teaching spirituality in initial formation. In my understanding of the novitiate process, teaching spirituality to novices entails three essential dimensions: vocation discernment, religious socialization and ongoing individual growth. These three aspects find a parallel in the lives of all Christians who seek to discover God's will in regard to their state in life or life's work, who long to form a vital connection with a tradition-bearing community and who strive to maintain a healthy sense of individual autonomy while enjoying deep ties to their faith community. What follows is a discussion of these three dimensions of initial spiritual formation.

Vocation discernment

The objective of vocation discernment in initial formation is to help candidates come to a prayerful and peaceful decision about God's will for them in regard to their state of life. Aspirants to religious life come seeking help in discerning whether God is indeed calling them to a lifelong commitment to the service of God with this particular group. To provide this assistance, the following considerations are helpful.[1]

Creating a climate of freedom and fostering solitude. The novitiate must create an atmosphere of liberating solitude. Henri Nouwen says that solitude is:

> that precious space where we can discover the voice telling us about our inner necessity – that is, our vocation. Unless our questions, problems, and concerns are tested and matured in solitude it is not realistic to expect answers that are really our own.[2]

The learning process of the novitiate must be viewed in a positive way, as a concrete aid to those trying to test out their call to religious life. It should not be designed or perceived negatively as a 'weeding out' system, something like the basic training of an élitist military unit or the strenuous audition for a coveted part in a chorus line. The novitiate process would be vitiated at its core, if it were seen as a systematic attempt to screen candidates by deliberately placing artificial obstacles before them and selecting them on the basis of their ability to overcome these obstacles. The destructive and dysfunctional consequences of this negative view of novitiate formation can be documented in the 'horror stories' of many older religious. In addition to the regrettable pain and hurt inflicted on people, a negative approach to the novitiate is fundamentally flawed because it encourages fearful and anxious novices to circumvent, rather than invest in, the complex process of discernment.

Vocation discernment requires solitude of heart, characterized by a trusting openness and a receptive attention to one's interior movements, as well as an honest disclosure and discussion of these movements in spiritual direction. These attitudes of openness and honesty cannot exist in the kind of atmosphere of fear and threat that a 'weeding out' approach inevitably produces. Furthermore, such an approach focuses excessive attention on external requirements that need to be met in order to survive within the system, like 'hoops one has to jump through' to make the grade. Dangerously distracting, such a preoccupation with 'making it' can seriously jeopardize the integrity of one's discernment process. Good discernment relies heavily on one's ability to hear the voice of God speaking deeply in the solitude of one's heart and in the concrete circumstance of one's life. In light of this, the formation director can be most helpful by imitating the guiding role of Eli the priest, who directed the young Samuel to wait in the place where he heard his name being called and to respond to that mysterious summons of God by praying, 'Speak, Lord, for your servant is listening' (1 Sam 3:1–9).

Seeking confirmation of a call through existential validations. After a vocational choice has been made, the discernment process in the

novitiate seeks to test out the depth and freedom of a person's desire to serve God as a religious through a process of existential validation. This method of testing is basically very simple. When they first enter, the novices are asked to live the life of a religious *as if* they had already taken the three vows of poverty, chastity and obedience. Then they are asked to pay attention to the 'fit' throughout the course of their novitiate experience. In other words, they are asked to 'try on the shoes of being a religious' and check for the fit as they actually walk in those shoes. In their day-to-day experience, do they find that living the vows in an actual religious community is life-giving and productive? Do they discover that, with the passage of time, there is an increasing congruence between what they want for their lives and the ideals of religious life? As they grow in knowledge of what being a religious involves concretely in this historical time and place, do they find an agreement between what they deeply desire and what religious life offers and requires today? An affirmative answer to these questions confirms the rightness of their choice.

The process of existential validation tests the authenticity of one's desires by checking for the correspondence between what one professes to desire and how one actually chooses and behaves. Although all human beings live with a certain discrepancy between the ideal and the real, drastic and consistent deviations from the norms of religious life should make one question the authenticity and depth of one's desire to be a religious. Though painful and disruptive, noticing persistent inconsistencies between one's professed values and one's operative values can liberate one to shape a future based on more genuinely held desires.

Furthermore, while self-reporting is an important means for gathering data in the process of existential validation, the feedback of the receiving community is also very important in testing out the existential fit between the individual novice and the peculiar charism of a particular religious institute. Vocation discernment in the novitiate must ascertain not only if a person desires to take on religious life, but whether he or she has been given the gift and charism to live that life fruitfully. A realistic assessment of this capability is a crucial aspect of vocation discernment. For example, from the concrete evidence of a person's life, can it be judged that God has given the aspirant to an apostolic religious community the following prerequisites:

- the ability to live in community with relative peace and joy?
- the capacity to love with celibate chastity in a non-exclusive manner?

- the freedom to live with simplicity and detachment?
- the ability to be mobile and available to be sent anywhere on mission?

The underlying presupposition of this line of inquiry obviously is that one's God-given abilities, personality traits and personal inclinations can indicate in helpful ways the precise form and manner in which one is being called to serve God. Not to pay serious attention to these concrete indicators is to disregard an important aspect of discerning God's will for one's life.

The process of religious socialization

The second dimension of teaching spirituality in the initial formation programme of a religious order involves the process of religious socialization. The term 'religious socialization' has been popularized by religious educator John Westerhoff III in discussing the question of how elements of religious faith are transmitted from one generation to another. While he does not apply the term to the formation of religious candidates, nevertheless it seems to capture quite well one of the essential purposes of initial religious formation, that is, the handing on of a religious tradition and spirituality to persons desiring to join a religious group. Religious socialization, according to Westerhoff, is:

> a process consisting of lifelong formal and informal mechanisms, through which persons sustain and transmit their faith (worldview, value system) and lifestyle. This is accomplished through participation in the life of a tradition-bearing community with its rites, rituals, myths, symbols, expressions of beliefs, attitudes and values, organizational patterns, and activities.[3]

Thus, through active participation in community life, spirituality is more caught than taught.

As defined by Westerhoff, religious socialization is a lifetime process and thus does not exactly describe the novitiate, which (to the relief of all involved) is limited to one or two years. Technically speaking, religious socialization is equivalent to the whole process of formation, which more and more is being viewed as a lifelong affair. Because of ongoing liturgical renewal, biblical and theological reflection, and the rapidity of change in the conditions of our times, religious have been urged to commit themselves seriously to 'continuing formation'.[4] Nevertheless, the novitiate is the initial phase of the lifelong process involved in the incorporation of members into religious life. Viewed as such, Westerhoff's notion of religious socialization provides

a useful way of understanding an essential aspect of teaching spirituality in religious formation.

The basic question raised by the task of handing on the spiritual tradition of religious life to new aspirants is this: *What* is to be handed down and *how*? What values, beliefs, mores and ways of proceeding has the receiving community judged to be of perennial worth, such that they should remain permanently definitional of the group? To employ a phrase of Alexis de Tocqueville, the nineteenth-century French observer of democracy in America, what are the 'habits of the heart' that the receiving community deems absolutely essential for maintaining its group life with integrity and vitality? In 'habits of the heart', Tocqueville included 'notions, opinions, and ideas that "shape mental habits", and "the sum of moral and intellectual dispositions" ' as well as habitual practices with respect to such things as religion.[5]

Once the receiving community has come to a clear consensus on the spirituality which it wishes to transmit, then it must decide on the most effective means for this transmission. The question of *how to* raises a number of considerations which every teacher of spirituality in formation programmes must ponder if the training programme is to have any intelligible rationale. Some of these important considerations are discussed below.

The question of contact and separation. Effective religious socialization raises the question of what amount of contact novices should have with family, friends, those in ministry and formed members of their own religious orders. Anthropologist Gerald Arbuckle SM has provided a very useful framework to reflect on this question.[6] Relying on anthropological data regarding initiation rites, he proposes a three-stage process for the novitiate, which, according to him, is essentially an initiation rite: the stages of separation, the liminoid stage, and incorporation or reaggregation.

Stage I emphasizes separating the novices from the ordinary life they have left behind in order to dramatize the radicality of the transition from lay life to religious life. While this stage may be brief, the separation is also symbolic.

> The symbolism must express to the candidate that in order to respond to the call of the Lord there must be a withdrawal from the world of 'ordinary' living with its roles and interests, its speed, and its distraction. The symbolism must convey the message that to follow the radical demands of the gospel message one must be prepared to 'leave father, mother, brothers, sisters, and all things' for the sake of the Lord.[7]

To convey this new reality dramatically, argues Arbuckle, novices should, at this stage, be separated physically and geographically from other members of the group who have already gone through the passage of initiation. Not to separate them, 'when the aims of the initiation process are so different from the aims of postnovitiate training, is to make the realization of the novitiate aims impossible to achieve'.[8]

The second stage, called liminoid (from the Latin, *limen*, threshold), requires the kind of seclusion that fosters strong investment in community-building. It is precisely in the context of a vibrant community life that neophytes are to *experience* the 'habits of the heart' that the receiving community wishes to transmit. This is the time for introducing the novice to the unique spirit of the institute, its peculiar charism within the Church, and its characteristic way of proceeding. By so inculcating its spirituality, mores, history and tradition, the receiving community aims to bond the new member to its past and thus to provide a foundation for the novice's identification with the group.

The third stage is that of incorporation or reaggregation, a period when the initiates are reconnected with the religious family outside the formation programme. This stage should be as long as, or even longer than, the liminoid stage. Basically a time of 'evaluating pastoral experience', this stage is to be seen as an integral part of the novitiate process. Arbuckle expresses the aims of the third stage by citing paragraph 25 of *Renovationis causam*:

> Besides gradual preparation for apostolic activities, they [that is, the experimental periods outside the novitiate] can also have as their purpose to bring the novice into contact with certain concrete aspects of poverty or of labor, to contribute to character formation, a better knowledge of human nature, the strengthening of the will, the development of personal responsibility and, lastly, to provide occasions for effort at union with God in the context of active life.[9]

In my opinion, Arbuckle's three-stage approach provides a rich and comprehensive understanding of the novitiate process, as well as a sound basis for determining the question of the amount of separation and contact that would be helpful for the spiritual development of novices. That there be some kind of alternation between separation and contact has also been clearly endorsed by others. For example, the Jesuit decree on novitiate formation states:

> Although entrance into the novitiate should entail a real separation from the life previously led in the world, superiors should nevertheless

> provide that the novices, while consistently maintaining a spirit of recollection, should have sufficient social contact with their contemporaries (both within and outside the Society). Likewise the necessary separation from parents and friends should take place in such a way that genuine progress in affective balance and supernatural love is not impeded.[10]

The Arbuckle model is useful because it enables the novitiate effectively to bond new members to the religious group, which is the goal of religious socialization. The bonding is both with the past (the community's traditions and history) and with the present (its present members and ministries). By means of formal and informal contact, then, the receiving community links its new members to its group life.

The question of structure and nonstructure. It is my opinion that both structure and nonstructure have important and different functions in teaching spirituality to neophytes. The learning process must include times for both. Structured time is important for the development of the habits and skills necessary for sustaining a lifetime of religious dedication. This time of structure is the period traditionally known as 'common order', during which the novices' day is regulated according to a schedule with definite periods for communal and personal prayer, for domestic work, for conferences and classes, for individual study and for ministerial involvements. Because the development of helpful habits of prayer and discernment requires regular practice, structured time for such training is important in the teaching of spirituality to beginners.

Equally important is time for freedom and less structure in the learning process. These times of nonstructure provide an opportunity for learners to discover to what extent they have appropriated what they have sought to attain during times of structured learning. For example, have they found themselves able to stay faithful to prayer when away from the structural supports of the novitiate? To foster personal responsibility for their own development among novices, the 31st General Congregation of the Society of Jesus decreed that:

> A necessity is that the novitiate's way of life be not so rigidly determined that the novices, lacking in all initiative, can hardly ever practice spiritual discernment, or even obedience itself, except in the form of a passive and impersonal submission.[11]

The free, nonstructured periods of the learning process allow neophytes to find out by observing their own unsupervised behaviour what

changes in their lives and attitudes have actually taken place as the result of their training in the liminoid stage. A rhythmic alternation between structured and nonstructured time constitutes an essential dynamic in any teaching process designed to develop a spirituality rooted in internalized values rather than external conformity.

The question of experience and reflection. Another important dynamic in the process of teaching spirituality in formation programmes involves the combination of experience and reflection. This mode of learning, variously called experiential learning or praxis, calls for the learner's active engagement in real-life experiences and a subsequent reflection upon those experiences, with an eye to what insights and knowledge can be gleaned from them. This form of experiential learning is applicable to many areas in which religious learners are challenged to grow, that is, prayer, community interaction and ministerial effectiveness. This mode of active learning seeks 'a transformation of our habitual patterns of thought through a constant interplay of experience, reflection, and action'.[12]

While experiential learning can be a powerful form of learning, there is always the danger that it can lead to anti-intellectualism if not carefully applied. This danger is effectively avoided when serious effort and sufficient time are devoted to dwelling on experience in such a way that ideas and principles are abstracted out of it and feelings are symbolized. Experience is the indispensable raw material of experiential learning. But its educational potential can be realized only through careful reflection and the application of new insights.

In addition to reflection, there is a further requirement of effective praxis. To be used intelligently, experiential learning must be grounded in a well thought out theory of experience. As the American philosopher John Dewey warned in 1938,

> The belief that all genuine education comes about through experience does not mean that all experiences are genuinely or equally educative. Experience and education cannot be directly equated to each other.[13]

Mere insistence on the necessity of experience, therefore, is not enough. In Dewey's words, 'Everything depends on the *quality* of the experience which is had'.[14] Therefore, to use the experiential mode of learning in teaching spirituality, teachers must ensure, first, that the *quality* of the learning experiences engaged in by the learners be periodically evaluated and, second, that the learners, with the assistance of a skilled facilitator, give sufficient time and attention to follow-up reflection on their experiences.

The ongoing process of individual growth

The third major dimension of teaching spirituality in formational programmes in religious orders requires fostering the ongoing personal growth of candidates to religious life. While the agenda of the receiving community is stressed in the process of religious socialization, the process of individuation, which Carl Jung describes as the gradual growth toward personal wholeness and integrity, respects the growth issues of individuals. Since it is increasingly the case that candidates for religious life represent a wide range of ages and maturity, formation programmes must recognize individual differences and aid individuals to move ahead, not regress, in the development of their selfhood. The ability to give of oneself freely in self-donation presupposes a high degree of self-knowledge and self-possession. Since individuation is a lifelong project, entry into religious life cannot halt its progress without stunting the healthy maturation of religious as human beings.

Continuous growth as a religious call. Since Vatican II, religious have been strongly encouraged to take continual human growth seriously and to take care that their commitment to religious life does not impede their equally important responsibility as human beings to develop their God-given potential. In the eyes of an increasing number of contemporary theologians, the motivation for continuous human growth is clearly a religious one. Human life is seen as a gift from God, who couples that gift with a challenge that we become co-creators of our lives, freely fashioning our lives into 'something beautiful for God'. In this ongoing process of human development, God and humans collaborate. Jesus' challenge to the puzzled Nicodemus, presumably already spiritually well-formed as a Pharisee, makes clear both the ongoing and collaborative aspects of human growth. The Greek word, *anothen*, used in Jesus' response to Nicodemus, contains a twofold meaning: 'again' and 'from above' (Jn 3:3, 5, 7). John's Gospel clearly asserts that human growth is both meant to be continuous and is always supported by power 'from above'. Thus, to refuse the challenge of continual self-transcendence is tantamount to not responding to God, because, in the words of theologian Gregory Baum, 'as destiny, as summons, as love, God is present' in the strivings of human beings to grow into the fullness of their personhood.[15] Consequently, formation programmes must reinforce among novices the importance of continuing their commitment to the process of individuation, even as they are simultaneously socialized into the group. Growth in spiritual maturity depends heavily on integral human development. This truth has long been captured in the Scholastic adage that 'grace builds on nature'.

Jesuit pychologist Leo P. Rock, a former novice director, applied this truth to novitiate formation in a pithy way:

> Grace does not substitute for nature, but fulfills it. Healthy, sane personality development is the most fertile soil in which grace can take root and grow. Growth in religious life can best happen in the situation which best fosters personal human growth.[16]

Teaching a spirituality that respects the importance of healthy human growth for integrated spiritual development must be guided by two psychological principles: the developmental nature of human growth and the importance of adapting to individual differences.

The developmental nature of growth. Human growth takes place in stages, with each stage presupposing and building on preceding ones. As developmentalists put it, these stages are invariably sequential. A person cannot, for example, go from stage one to stage four by skipping the intervening stages. This principle thus requires that every individual be met where he or she is at on entering the formation programme, and then helped to proceed forward, stage by stage, from that personal starting-point. This is especially important today, because persons entering religious life vary so much in age, background and development. An undifferentiated treatment of people would prove to be an unenlightened and eventually frustrating approach.

The importance of individual adaptation. Because, as a Jesuit formation document puts it, 'human development does not proceed at the same pace in everyone',[17] adaptation of the process to individuals is essential. St Ignatius of Loyola, a master in the art of teaching spirituality, emphasized the importance of adaptation:

> The Spiritual Exercises must be adapted to the condition of the one who is to engage in them, that is to [one's] age, education, talent. Thus exercises that [one] could not easily bear, or from which [one] would derive no profit, should not be given to one with little natural ability or of little physical strength. Similarly, each one should be given those exercises that would be more helpful and profitable according to [one's] willingness to dispose [oneself] for them.[18]

Therefore, the teaching of spirituality requires that the focus be kept on the individual and the particular areas of his or her life that stand most ready for development at any particular time. Force-feeding of any kind not only risks doing violence to people, but will ultimately be counterproductive in leading to any kind of significant, long-term learning.

In conclusion, no treatment of the topic of teaching spirituality would be complete without a word about the paradoxical nature of spiritual growth. While we are called upon to bring all of our knowledge and skill to the task, it is the Holy Spirit who effects growth and whose gifts shape the soul – a Spirit who, much to the surprise and confusion of our best-made plans, still blows where it wills. This does not relieve us of the responsibility of furthering our expertise, but it does remind us that it is the Spirit who ultimately produces the growth we hope to facilitate.

NOTES

[1] For a more detailed discussion of the process of vocation discernment, see 'Heart searching and life choice' in my *By way of the heart: toward a holistic Christian spirituality* (New York: Paulist Press, 1989; London: Geoffrey Chapman, 1990), pp 57–84.

[2] Henri Nouwen, *Reaching out: the three movements of the spiritual life* (Garden City, New York: Doubleday & Company, 1975), p 40.

[3] John Westerhoff III and Gwen K. Neville, *Generation to generation: conversations on religious education and culture* (Philadelphia, Pennsylvania: United Church Press, 1974), p 41.

[4] Nos 138–140, 'The spiritual formation of Jesuits' in *Documents of the 31st and 32nd General Congregations of the Society of Jesus* (St Louis, Missouri: The Institute of Jesuit Sources, 1977), pp 111–113. See also n 23, 'Companions of Jesus sent into today's world', Decree 1, *Documents of the 33rd General Congregation of the Society of Jesus* (St Louis, Missouri: The Institute of Jesuit Sources, 1984), p 50.

[5] Quoted in Robert N. Bellah et al., *Habits of the heart: individualism and commitment in American life* (San Francisco, California: Harper & Row, Publishers, 1986), p 37.

[6] Gerald A. Arbuckle SM, 'Planning the novitiate process: reflections of an anthropologist' in *Review for Religious* 43 (1984), pp 532–46.

[7] *Ibid*, p 540.

[8] *Ibid.*

[9] Quoted *ibid.*, pp 542–3.

[10] No 22, Decree 8, 'The spiritual formation of Jesuits', *Documents of the 31st and 32nd General Congregation of the Society of Jesus*, p 104.

[11] *Ibid.*, no 19, p 103.

[12] Decree 1 n 40, *Documents of the 33rd General Congregation of the Society of Jesus.*

[13] John Dewey, *Experience and education* (London: Collier-Macmillan Company, 1938), p 25.

[14] *Ibid.*, p 27 (emphasis in the original).

[15] Gregory Baum, 'Reply and explanation' in *Ecumenist* vol 9 (November 1970–February 1971), p 18.

[16] Leo P. Rock SJ, 'The Califonia Province novitiate: what we do and why', an unpublished paper (September 1973), p 4.

[17] No 24, Decree 8, 'The spiritual formation of Jesuits', *Documents of the 31st and 32nd General Congregation of the Society of Jesus*, p 105.

[18] Exx 18.