Journal of Invitational Theory and Practice

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Editorial——

Invitational Lessons

With this issue we close the second volume of our journal, and the dawn of the third volume begins my last term as editor. Reflecting on what we have accomplished thus far, I am pleased with the first four issues, and look forward to working with authors in the year ahead.

Editing the first two volumes, I have learned many lessons. The first of which is that this journal is the product of much effort by many people. I am extremely grateful to members of the editorial board who have reviewed manuscripts. Special commendations go to the reviewers who completed their term during 1993. They are: Nancy Vacc, Clayton Arceneaux, Sandra Damico, and Paula Stanley. Taking time to carefully review manuscripts and return them in a timely fashion are hallmarks of exceptional editorial assistants, and I sincerely appreciate each of these reviewers for their contribution to this journal.

Another lesson I have learned is that there are many perceptions about the value of invitational theory. We have received manuscripts from around the world, and in each instance the author has given a particular focus and meaning to invitational concepts. This has been an interesting study for me, and I hope for the readers of this journal. As the journal for an emerging theory, this periodical will continue to elicit a range of reactions, interpretations, and understandings. While all may not be in agreement, and some may raise contradictions, they each contribute to the development of the theory. For this reason, it is essential that members of the Alliance and practitioners of invitational theory contribute to this effort. Without these contributions the journal will not survive. It will have no reason to.

One of the most difficult lessons I have learned is that people do not necessarily want to write about what they believe or what they do. "Inviting" authors to submit their ideas has been challenging. I appreciate the many manuscripts submitted for review, and encourage other authors

to send their thoughts, research, and prognostications about invitational theory. While we cannot publish all the manuscripts received, the Alliance is fortunate to have a first class newsletter, The Forum, under Paula Stanley's editorship, and many of the manuscripts not used in the journal are passed on to Paula for further consideration.

This issue of the journal offers a wide range of ideas and applications for invitational theory. The lead article by William Purkey and John Novak offers a schema for examining one's own development as an invitational student, practitioner, and theorist. Their article provides the impetus for further discussion about the developmental levels of invitational understanding and practice.

David and Cheryl Aspy argue persuasively to use the invitational approach in medical education. They compare the elements of Problem Based Learning with the invitational philosophy, thereby offering another arena for this emerging theory of practice.

In a historical piece, David Ryback suggests that invitational theory shares many beliefs with ancient eastern philosophies. He submits that teachers and other educators who embrace the invitational perspective may benefit from an understanding of eastern principles.

In a personal disclosure, Monica Briscall reveals how she and her family adapted an invitational approach, the 5-P Relay, to restructure their family time. This journal welcomes personal testimonials regarding the application of invitational theory, and Monica's article is an example of this type of essay.

We end this issue with a book review by Elizabeth Foster. It is most appropriate that this first review is of a book by William Purkey and Paula Stanley. Dr. Purkey is the founder and co-director of the Alliance and Dr. Stanley has been a strong leader in the Alliance during recent years. We invite reviews of other books that either have an invitational focus or because of their content will have importance for readers of this journal.

John J. Schmidt
Editor

The Invitational Helix: A Systemic Guide for Individual and Organizational Development

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Beginning in the 1970s and gradually emerging as a defensible theory of practice, invitational theory is now on the threshold of making a significant contribution to individual and organizational development. What is needed now is a guide that assists individuals and organizations to move towards the highest levels of invitational functioning.

This paper introduces a guidance system for the application of invitational theory. The system is named "Helix" because it spirals through 12 steps of development divided into three levels:

> Introductory (learning about the theory and practicing it at a surface level)
> Intermediate (moving from simple to more complex ways of understanding and practicing it)
> Advanced (comprehending its complexity and applying it to the most challenging concerns)

Helix follows the pioneering work of Stillion and Siegel (1985) who first suggested that a hierarchy exists within invitational theory. It also answers a call by Novak (1992) asking that proponents of invitational theory delve deeply into its theoretical and ethical components.

THE INVITATIONAL HELIX

A Systematic Guide for Individual and Organizational Development
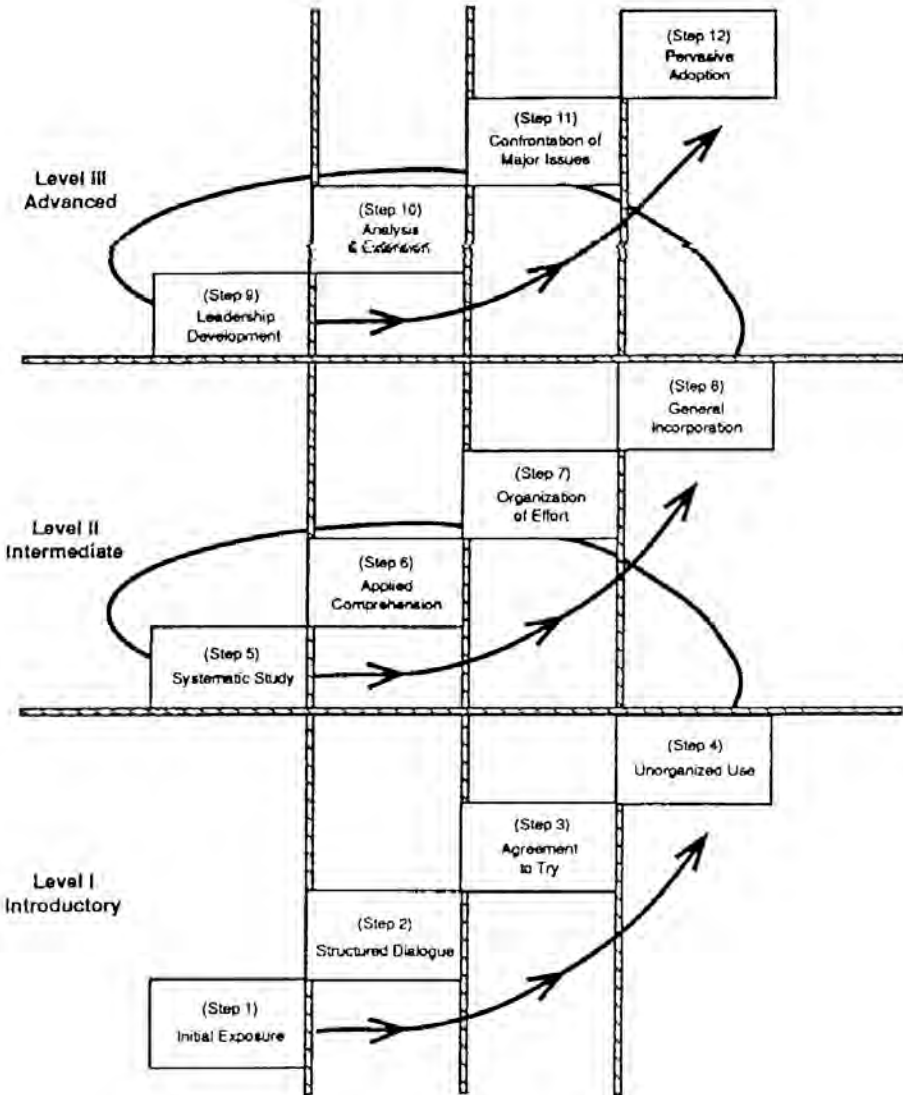
Why Helix Is Important To Invitational Theory

It is critical that proponents of invitational theory, who give talks, conduct workshops and present programs understand the complexity of the theory in planning the content and level of their presentations. Proponents of the theory should study its intellectual and ethical dimensions and continuously work to strengthen their grasp so that they can help themselves, others, and organizations move towards the highest levels of invitational functioning.

Unfortunately, invitational theory is sometimes misunderstood as being merely an emotional "quick fix" of limited value and duration. Novices occasionally view the theory as simply a laundry list of games, techniques, and various clever ideas...a hodgepodge of useful but largely unrelated suggestions for doing good things. While many of the introductory applications of invitational theory, including skills, techniques and ideas, are worthwhile and effective, they represent only the beginning level of this approach.

The value of Helix is twofold: (1) it allows the practitioner of invitational theory to quickly identify the level and stage of functioning of any individual or organization, and (2) it serves as a dependable road map to guide individuals and organizations in their efforts to forward the theory. The following narrative explains the 12 steps of Helix across its three levels.

I: Introductory Level

Level I of Helix consists of four initial steps. These beginning steps provide initial exposure to invitational theory and offer practical and concrete methods for implementing basic inviting techniques and skills with individuals and organizations. Level I is characterized by unrelated suggestions that facilitate immediate improvement. These various suggestions often provide affirmation and appreciation for inviting methods and skills already practiced by individuals and organizations. These suggestions are usually nonthreatening, frequently unrelated to each other, and relatively easy to apply.

Level I processes are concerned with creating an inviting ambiance, which might include answering telephones differently, hanging plants in the foyer, or organizing social events. In and of themselves, these rudimentary activities bring about little change in the fundamental attitudes and functions of individuals and organizations. They do, however, prepare the way for more substantive change. The four steps of Level I follow.

Step 1: Initial Exposure

Step 1 is the first awareness that invitational theory exists. This dawning might take place while attending a conference or workshop, hearing a speaker, reading an article or book, or viewing a videotape. Ideally, this initial exposure is accompanied by reading material to prepare individuals and organizations for Step 2.

Step 2: Structured Dialogue

Step 2 involves some form of organized follow-up discussion within the organization. This might be an afternoon meeting following a morning general session, a retreat, a series of job-alike or team meetings, or some other type of organized discussion to help people understand the significance and usefulness of the theory. This dialogue should also focus on recognizing and appreciating the inviting practices already in place.

Step 3: Agreement to Try

This third step calls for individuals and members of organizations to try various inviting ideas and suggestions. These trials typically consist of uncoordinated individual or small group initiatives. The purpose of Step 3 is to try things out and see what works. In Step 3, simple modifications and innovations, such as making signs more friendly, improving the lighting at work stations, or sending appreciation cards, are expected and welcomed.

Step 4: Unorganized Use

Step 4 concludes Level I of Helix with the adoption of one or many inviting suggestions. These adoptions remain largely unorganized and uncoordinated, yet they have become a part of everyday practice. Because they work well they are likely to be a relatively permanent fixture in individual and organizational functioning.

An important requirement of this concluding step in Level 1 is for individuals to share invitational successes both within organizations and beyond. Sharing successes prepares the ground for Level H.

II: Intermediate Level

Level II is the development of the crafts involved in invitational theory. Its aim is to develop relationships among various steps and to produce systematic changes within the organization. Level II consists of Steps 5 through 8 of Helix.

Step 5: Systematic Study

This step is characterized by systematic study of invitational theory. It requires that individuals and organizations become aware of the various components of invitational theory. This systematic study should be directed by an experienced and knowledgeable person who is trained in invitational theory. Step 5 requires careful reading and usually involves at least a full-day intensive dialogue in the form of a workshop or conference.

Step 6: Applied Comprehension

At this step there is an effort by everyone involved to be able to explain his or her understanding of invitational theory, to reflect on what is presently happening in individuals and organizations, and to compare what is taking place in light of its assumptions. This requires the ability to give an in-depth explanation of invitational theory, to offer an analysis of present practices, and to be able to answer questions about the structure, meaning and applicability of its approaches.

Step 7: Organization of Effort

Step 7 introduces the "5-P" approach to invitational change (People, Places, Policies, Programs, and Processes). Individuals can work alone to explore the usefulness of the "5-P's," but step 7 usually requires working in groups. This is done by creating five "strands" (teams of people) within the organization, with each strand taking one of the five P's: People, Places, Policies, Programs, and Processes. At Step 7 a coordinator for each strand is appointed and general agreement is reached to systematically employ the 5-P approach to conduct an in-depth analysis of each of the 5-Ps and to work on organizational transformation of each strand. Step 7 is an ideal place to apply group craftsmanship through group exercises, such as the "5-P Relay" and the "Rule of the Five C's." These group activities are available by contacting the International Alliance for Invitational Education, School of Education, University of North Carolina at Greensboro, Greensboro, North Carolina 27412.

Step 8: General Incorporation

The goal of Step 8 is to institutionalize the 5-P strands and their work within individuals and throughout the organization. This involves regular strand meetings, coordinator meetings, regular feedback and special efforts to keep things going. This includes joining the International Alliance For Invitational Education, using consultants on invitational theory on a regular basis, forming networks with other individuals and organizations, and sending teams to Invitational Leadership Training Programs.

III: Advanced Level

The goal of Level III is to have invitational theory pervade the attitudes of individuals and the cultures of organizations. This requires sustained concentration on basic concepts that leads to a logical integration of invitational theory. The intention of this phase is to develop individuals and organizations that take a proactive stance to incorporate the deepest intellectual and ethical commitments of invitational theory.

Step 9: Leadership Development

To maximize earlier development and to continue progress, individuals and organizations are now ready to conduct (or send a leadership team to attend) a three-day residential workshop on invitational theory. These workshops are conducted by highly trained leaders in invitational theory. The goal is to advance the theory while developing additional skills, crafts, and arts. Step 9 provides the opportunity for experienced practitioners of invitational theory to refresh their training and to develop their abilities.

Step 10: Analysis and Extension

Newly trained leaders in invitational theory are asked to critically analyze the theory and to compare and contrast it with other educational systems and approaches. Leaders should be able to explain invitational theory in multiple ways and describe its uniqueness among systems. They are able to think about the most complex dimensions of invitational theory and extend them theoretically. Leaders understand its ethical, societal, and theoretical dimensions and the need for individual and institutional adoption.

Step 11: Confrontation of Major Issues

At this advanced level of functioning, leaders in invitational theory are able and willing to address major challenges and concerns regarding individuals and organizations. Basic issues regarding the symbolic webbing of organizations and the ability, value and responsibilities of individuals are actively considered along with issues of racism, sexism and the nature of democratic values and human decency.

Step 12: Pervasive Adoption

At Step 12 invitational theory is rooted in every aspect of the lives of individuals and organizations. It is reflected in the interactions of people, the appearance of environments, the programs established, the policies supported, and the processes that reflect the five basic assumptions of invitational theory: (1) people are able, valuable, and responsible and should be treated accordingly, (2) organizations should be cooperative and

integrative, (3) process is as important as product, (4) people possess untapped potential in all areas of worthwhile human endeavor, and (5) human potential can best be realized by places, policies, processes, and programs specifically designed to invite development, and by people who are intentionally inviting with themselves and others, personally and professionally.

Conclusion

Invitational theory aims to have a positive, sustained and creative impact on the actions of individuals and the cultures of organizations. To do this, the theory needs knowledgeable spokespersons who: (1) have an awareness of the deep commitments involved in the theory, (2) possess a sound and expanding understanding of its parts and whole, (3) apply, imaginatively and courageously, its techniques and spirit, and (4) use skill and persistence to develop an inviting culture within organizations and people. This requires deep feeling, solid thinking, and coordinated action. Helix is offered as a dependable guide for helping those who advocate invitational theory to speak with knowledge regarding its levels and developmental steps.

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Problem Based Learning: A Medically Based Ally of Invitational Education

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A lady walked into her husband's hospital room and saw him lying amidst an incredible array of tubes attached to an equally complicated conglomeration of bottles. Doctors and nurses were whirling around the room doing tasks smoothly but hurriedly as if there was no time to lose. She stood silently as her stomach lurched with indescribable fear that she had to restrain in order not to upset her spouse. She was an emotional cauldron.

This true story can be repeated by millions of people worldwide. There are moments of life and death in all medical settings and people's emotions are taxed their limits. It is imperative that physicians help their clients cope effectively with their seething feelings.

The New York Times quotes C. Everett Koop, the former US surgeon general, as saying:

> ... in their preoccupation with learning and using new techniques, some doctors have lost sight of the human side of the doctor patient relationship. (New York Times, September 2, 1992, A 6)

The Wall street Journal is even harsher. It said:

> The board (medical examining board) is responding to a persistent complaint: The bedside manner of physicians is abominable....When the University of California, Los Angeles asked why its medical students chose the healing arts, the no. 1 reason

was to earn a comfortable living. Working with people was third (Wall Street Journal 3/17/92, B3).

So, there is reason to assert that medical education should be more inviting and should prepare its students for those inevitable moments when they must respond effectively to the emotional states of patients and patients' families.

Medical Students' Interpersonal Skills

Given the importance of emotions in medical situations, one of the emergent questions is whether or not physicians have sufficient interpersonal skills. There is some evidence that speaks to this matter.

An anecdote from the Wall Street Journal speaks loudly to this question:

Francis Vogler (a physician) lay in agony on a table several years ago. Her neurosurgeon, radiating all the warmth of his stainless instruments, was cruelly blunt as he prescribed immediate surgery. "You have a 50% chance of dying or becoming quadriplegic," he announced. As the patient began to cry, the surgeon briskly walked out of the room. "I was totally shocked," she says.

Objective evidence is equally indicting. It reveals that during office visits, general practitioners spend on an average less than seven minutes talking with patients (Nazard, 1992).

Medical education faced itself in the early 1980s when the Association of American Medical Colleges published a classic report titled, Physicians for the Twenty First Century (1984). It stated boldly, "The present system of general professional education for medicine will become increasingly inadequate unless it is revised" (p. xiii). The critical question was: What specific changes needed to be made? One of the recommendations was, "The focus of learning should be on patients and patients' families" (p. 15).

One mayor issue was: How adept are medical students at responding to patients' feelings? Aspy (1976) completed two studies of medical

students' interpersonal skills in two separate medical schools. In each investigation 50 second year medical students completed medical history interviews with normal patients. Those interviews were evaluated according to Carkhuffs Scale for Interpersonal Understanding whose scores range from a high of 5.0 to a low of 1.0. The mean score for both groups of medical students was 2.0 with a range of 1.5 and standard deviation of 0.3. Subsequent investigations in other medical schools have yielded almost identical results.

The findings for medical students are consistent with wide ranging investigations in other areas. Carkhuff (1983) completed an extended series of studies of various helper groups and found that mean scores for their interpersonal functioning clustered around 2.0. Aspy, Aspy, and Roebuck (1984) have conducted studies of thousands of teachers in 42 states and 7 foreign countries and have also reported means of 2.0. There is much evidence to support the thesis that most of the American population is operating at a 2.0 level interpersonally. Diagnostically, this is detractive in the sense that responses of that type decrease a person's level of self exploration (disclosure).

The foregoing data indicate that medical students probably are functioning interpersonally at a level comparable to the remainder of the population. This is to say that without training their responses diminish the intensity of their clients' expressed feelings. Thus, they tend to decrease the levels of client communication.

The importance of interpersonal functioning among medical practitioners was illustrated by Aspy's (1992) research, which indicated that the quantity of the information disclosed by patients is directly and significantly related to the physician's level of interpersonal functioning. This study is supported by earlier investigations by Roebuck (1984) at Johns Hopkins University.

Can Students' Skills Be Improved?

If the untrained responses of medical students tend to diminish client communication, then a significant issue is whether or not theycan be helped to make better ones. Is it possible to teach physicians to respond to their clients in ways that elevate patient communications?

Several medical education programs are implementing specific procedures designed to enhance physicians' relationship skills. Among those efforts a significant strand is Problem Based Learning (PBL).

This approach originated during the 1960s in Ontario, Canada, at McMaster University Medical School where the instructional staff took their first steps toward emphasizing the human side of medical education by reducing the formal or ritualized aspects of their program.

Other medical programs were searching for more human ways to educate a physician and many procedures were tried. One of those institutions was the University of New Mexico Medical School where a few professors sought, processes that would emphasize the human quality of the doctor patient relationship. Thus, it was serendipitous that in 1975, Dr. Howard Barrows of the McMaster Medical School met Drs. Scott Obenshain and Arthur Kaufman at the southwest school.

Dr. Barrows' enthusiasm for McMaster's new program captivated the New Mexico professors who initiated a similar effort at their institution. The foundation of their program was the intent to replace the students' passive role with methods that made learners active participants in their own learning. The impetus for this effort grew from the repeated experience of seeing eager enrollees mutate into passive recipients of information doled out by others

A carefully designed effort at New Mexico was implemented slowly with the intent of inviting everyone to participate. The new program was structurally simple. Five students were to be placed in problem-solving groups where they were given medical problems that developed from real or simulated patients. They were supposed to devise treatment programs to meet the problems.

Instructors met periodically with small groups of students to help them discuss their problems and their proposed treatments. In the periods between group discussions, students had access to laboratories, professors, etc., for information.

This instructional mode was entirely new for most professors in that it redefined their role almost diametrically. They went from lecturers to listeners and responders. This change was a shock to may teachers and created a great deal of stir among them. The main concern was how to control the cultural shock of the new and threatening instructional procedure.

In good scientific form, the innovative program, now called problem-based learning (PBL), was implemented as an experiment. It was tried by a small group of volunteer students and professors.

The major question was: Would the students in the PBL program cover and learn the required material? Or, would they miss some of the vital content?

The critical test for all American medical education programs is the students' performances on the National Medical Boards, which usually are taken the second year of medical school. Their test results revealed that the PBL students earned scores equal to those of their traditionally educated cohorts.

The results from the National Board tests indicated that when medical students are exposed to an instructional program that trusts and uses the students' intrinsic desire to learn, they do as well as those who are provided highly structured educational experiences. In addition, the PBL students developed better self-directed learning skills and liked both themselves and school significantly better than did the traditional students (Kaufman, 1985).

The PBL approach to medical education continued to spread across the nation and was given a significant boost in 1985 when Harvard Medical School adopted its New Pathways program, which is based heavily on PBL methods (Tosteson, 1991). The new program is now entrenched at Harvard and other institutions such as the University of Chicago,

Emory University, Stanford University, Dartmouth Medical School, and Southern Illinois Medical School.

The intervening events underscore the correctness of an observation by Dr. C. Everett Koop who said:

> The time is ripe for change because all parties—students, faculty, and public—agree that system isn't working. Nobody doubts patients are dissatisfied. Medical faculties realize they are teaching a group of people who are not satisfied with their education. The average medical student feels dissatisfied, let down by her/his education. (New York Times, Editorial, September, 2, 1992, p. A6)

While Koop's comments are general, it is clear that PBL is one of the specific cutting edge changes in medical education.

Implications of the Spread of PBL for Medical Education

To non-medical observers the advent of PBL in medical education may seem relatively insignificant. But, to medical educators this change has important ramifications for their field as well as education generally. Dean Wilson of the University of Kentucky Medical School put the issue in perspective when he commented that, "Changing the curriculum is like moving a graveyard. Faculty members have lectures prepared and some don't want to do the extra work of changing the way they teach." (Gil, 1992, p. B1). However, PBL is a means for bringing about the curricular alterations that seemed so impossible a decade ago in a medical profession entrenched in tradition.

Since medical education is related to a prestigious profession, its clout throughout the educational world is rather significant. It speaks with some unusual authority. Thus, it can influence events beyond its boundaries.

The impact of PBL in medical education may have a ripple effect. If medical schools seek students who can operate effectively in self-directed learning environments, then they will select students who have those skills. This means that elementary, secondary and undergraduate institutions will be influenced to prepare students for self-initiated learning

contexts. This is a diametric change from the status quo because for many years the pressure from medical schools has been directed toward passivity in learning.

One extended outcome of PBL in medical education is a general movement toward programs that encourage learner initiated behaviors. This is highly significant shift throughout education in general.

Implications for Invitational Education

Invitational education is a highly significant movement for the twentieth and twenty-first centuries. It has distinguished historical roots that reach into a rich reservoir of human educators such as Comenius, Pestalozzi, Rousseau, Christ, Rogers, Combs, Kelley, Wiles, Avila, Tatum, and others. Lineage is long and illustrious. Now, the International Alliance for Invitational Education stands at the cutting edge of that movement.

The main thrust of the entire parade of humane advocates has been to free all people so that everyone could develop their inherent potential for being fully human. Today, as the main custodian of that noble challenge the Alliance has the privilege to both see the fruits of the collective labor of humane educators as well as to nourish them and thereby extend them to the next generation.

As one example of the flow of humane efforts, Problem-based Learning, which began in medical education is moving into pre-college programs. Already an institute for the advancement of PBL at the secondary and elementary levels is being established in Aurora, Illinois and the Association for Supervision and Curriculum Development (ASCD) sponsored a conference on the subject in the summer of 1992 (O'Neil, 1992).

PBL is consistent with the principles of invitational theory and practice. Purkey and Schmidt (1990) wrote, "The goal of invitational learning is to change the entire structure of organizations by building a foundation of respect, trust, optimism and intentionality (p. 1). Surely, PBL meets those criteria.

Thus, Problem-based Learning is an ally of invitational approaches. It is an offspring of the thinking that also created the International Alliance of Invitational Education. Hopefully, cooperative efforts will develop between invitational learning and PBL advocates and, within the near future, physicians will be exposed to more of the type of education that all proponents of human decency advocate. In short, invitational educators have a strong friend in medical education and that is good news for everybody.

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Eastern Sources of Invitational Education

David Ryback
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Invitational education has epistemological roots in ancient eastern philosophies, particularly the better-known ones such as Buddhism, Taoism and Confucianism. These philosophies share the basic assumptions of invitational education—a sensitivity to and consideration of others' needs, emanating from a continuing awareness of self and inner truth. The purpose of this article is to give a brief introduction to the historical figures who advanced these philosophies, and to present a brief indication of the commonalties these belief systems share with invitational education. In addition, practical applications of each of these philosophies are offered for classroom settings. If this purpose is met, the reader will enjoy not only a broader appreciation of invitational education, but also its enhanced applications as well.

The Puritan ethic of Western civilization imbues us with the deeply held belief in a no-nonsense approach to hard work—only then do we "earn our keep," only then are we "worth our salt." Teachers of early American schools thrived on drilling their students with memory skills to the tune of a wavering hickory stick. Rapped knuckles and dunce caps were the dues of not "toeing the line."

Things are certainly different in today's classroom in the west, but we have much to learn. The philosophies of the east, particularly Buddhism, Taoism and Confucianism, have something to offer as we extend outward to empower others with love without trying to control or possess; to love and let go at the same time.

Just as we in the west preach the Golden Rule, the Indians preach self-understanding and the Chinese preach moderation and temperance. We in the west have chosen to focus on social striving with competition as a mode of personal growth, while the Indian culture emphasizes each person's self-understanding, and the Chinese culture centers primarily on human relationship with nature.

Buddhism

Buddha, the man, born over 2,500 years ago, was himself a teacher of philosophy. He was born into the wealthy Sakyamuni family carefully sheltered from poverty, disease and evil. But it took only one incidental exposure to the grim realities of life outside his father's estate to persuade the young Sakyamuni to leave his comfortable home, travel and study philosophy with whatever great teachers he could find along his travels. Eventually he was to become one of the greatest teachers of philosophy and metaphysics.

After years of deep and serious reflection, Buddha began to teach his doctrine of humanistic personal growth through one's own effort. Living his own philosophy, Buddha taught that all people are masters of their own fate, or can be if they so choose. He discouraged his followers from deifying him, encouraging them instead to find their own ways by searching within. Self-reflection and inner awareness were encouraged, along with the discipline of non-attachment to material goods and superficial ego supports.

One of the Four Noble Truths of Buddhism is the concept of "dukkha," which maintains that a person's human perfection stems from the state of imperfection and incompleteness. Like the rambling banyon tree without a single trunk, our self-concepts are made up of a myriad of ongoing experiences. We grab at meaning from the chaos of the world and try to simplify such chaos into a theory that justifies a monolithic personality, but we are much more complex than that. Buddhism allows for this human complexity.

To label persons as shy, aggressive, lost, or successful is hardly the whole truth of the matter, for individuals are more than single entities. We all have the power to reach for ideals that we have only dreamt of until now. Those of us who teach, for example, can allow ourselves to be more open and honest with our students regarding our ongoing feelings about them and about our passion for what we teach. By being open to more in ourselves, we can be open to more in our students. The joy and power in being more of ourselves invite our students to experience more joy and power in being themselves in our presence.

Confucianism

The Chinese "patron saint" of teachers was Kung-fu-tzu, otherwise known as Confucius among Westerners. A contemporary of Buddha Sakyamuni, Confucius was first of all a school teacher, consultant and advisor to many. His teachings gave rise to such a strong intellectual movement that they eventually overpowered both Taoism and Buddhism in China, not so much as a religion but as a social movement and cultural ethic.

Confucius was probably China's first invitational educator. The basic Confucian virtue is "zren," the Chinese term for "man" or, more appropriately, "mankind" or "human-heartedness." This virtue is to the Confucian ethic what detachment is to Buddhism, what charity is to Christianity, and what righteousness is to Judaism.

Confucian morality emphasizes the hierarchical structure of social relationships. As such, the social context determines what is morally right. Discipline in the Chinese classroom does not come downward from a harsh teacher to submissive students, but rather goes upward from respectful students to an admired teacher.

This is probably one of the most difficult things for Westerners to understand when they visit Chinese schools: the combination of high motivation and strong sense of cooperation that exists in the absence of any externally imposed constraints. Invitational education flowers easily in such an environment.

Perhaps this is one of the chief differences between east and west. We in the west struggle for individual freedom and expression, which inevitably results in competition and feelings of alienation. In traditional China, the struggle is for self-less consideration of others (Confucian humanism) and collective achievement, which results in strong feelings of identity at home, at work and in the classroom. The

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[1]Although Confucius viewed women as little more than slaves, this was more a characteristic of Chinese culture than of his own predilections.

Confucian principles are best exemplified by the concepts of "yi," the principle of reciprocity, and "chung-shu," conscientious altruism expressed by empathy and moderation.

The essence of Confucian philosophy, as it applies to the classroom, can be characterized by an appreciation of each person's status in the classroom and a mutual respect between each student and teacher, which allow the fullest development of invitational education—moral feeling experienced with aesthetic sensibility.

Taoism

Another great Chinese teacher and contemporary of Kung-fu-tzu was Lao-tzu, the founder of Taoism and author of Tao Te Ching (The Way and Its Power).

Lao-tzu may have been the first exponent of open education. In a classroom setting, Lao-tzu would focus on the space within rather than on the walls. As a Taoist, he was more oriented toward processes than goals. Mystical awe of the universe is more important in Taoism than trying to change one's environment. The most important things in our world cannot be easily grasped.

The basic Taoist principle of "te," to be true to oneself, to one's true inner nature, is an excellent guide for invitational teaching. Teachers who hold to the core of their inner nature as accepting, understanding educators will encourage students who, in turn, are more likely to accept and understand their teachers. Attempts at coercive control often meet with resistance, but adherence to "te," trusting one's innermost feelings of true acceptance of others, is apt to bring out the more mature characteristics of students.

Successful teachers do not stress competition in the classroom by favoring only those students who accomplish the most. Rather, they encourage all to do as much as they can. Such teachers are patient with those who are slow. They know that a plant cannot be rushed as it grows. They are sensitive to the students' intrinsic nature, and invite the development of inner resources so that every student can develop the power within.

The Tao maintains that the teacher must also have respect from students. This involves a clear communication of the teacher's self-respect by making known the expectations and hopes of what is to take place in the classroom. Unless the teacher can successfully establish a sense of mutual respect in the classroom, attempts at sharing a joyful interaction will be met with mistrust and noisy distraction.

The Taoist code of reacting to threat is to yield to the natural flow rather than to resist. "That's fine in theory," some teachers might say, "but how do you apply that to a classroom of rambunctious students?" One possibility of coping with such a situation is to identify, first of all, the leader and then approach the situation according to the student's needs. Yield to the flow rather than resisting it.

An example of yielding to the flow can be seen with children who need more attention than they already receive. Instead of chastising and threatening them, teachers might approach them by name and warmly invite these students to join them at the head or center of the classroom. Sometimes the students respond by denying their behavior: "I didn't do anything, Teach, honest!" The teacher agrees and perseveres in the invitation for the student to join her or him. When I have used this approach, I invite the student to relate to the class however he or she wishes. The student may be embarrassed at first, or awkward, but soon realizes that I feel good about all the attention she or he is getting, so long as the student is honest about it and takes responsibility for his or her desires. Usually, the student and I become closer and the rest of the group becomes friendlier, too, rather than disruptive. It has worked for me every time.

Enjoying the Quiet of Zen in the Classroom

Zen Buddhism is a marriage of Indian Buddhism and Chinese Taoism. Zen blends Buddhist non-attachment with Taoist mysticism. Zen teaching involves a continuing focus on the ongoing present moment.

There are times in class when it is appropriate to focus on the ongoing present. There is a time for structure and a time for flow, and each has equal significance in the classroom.

Zen presence in the classroom allows for the appreciation of silent moments. The first time this occurs, teachers might allow it to happen. Inevitably, someone will break the silence prematurely with an embarrassed nervous statement, "Isn't anyone going to say something?" A few others may nod in agreed exasperation. At this point the teacher might explain Zen presence.

Talk serves two functions: to communicate and to fill time and space with noise. Both are appropriate functions. There are times when we have nothing important to communicate, but talking still feels good. This doesn't mean that we have to talk all the time in order to feel good with others.

From my own experiences, when I am discussing something with the class, there may be a period of silence if I have said something of significance and the impact of that statement gives pause for reflection. If the class understands the importance of reflective silence, students can enjoy it in a most meaningful way. In that case, the silence is broken, not by nervous giggling, but by another meaningful reflection of a student who feels invited to share an insight or an emotional comment.

The whole tone or atmosphere of the class is now one of mutual reverence and deep reflection of whatever is shared. The teacher becomes a learner, too, as he or she invites independent thinking on the part of the students.

Now this may be quite surprising to most. The more one yields, the more one gets. Instead of pushing and forcing, simply allow the moment to be. If Zen presence in the classroom can be achieved, yielding to the moment allows for more independent, creative and open thinking. This is known as the "backwards law" of Zen: If we struggle to stay afloat, we sink, but if we just relax, we rise to the surface, effortlessly.

This, of course, makes teaching a much more invitational experience. More than that, these Zen moments of teaching can become the highlights of one's "working" day. To really share of oneself and to allow students to share of themselves creates powerful feelings of personal presence felt by all. These moments of "flow" will make structured time more comfortable as well.

Relevance to Invitational Education

Invitational education has a strong connection with these eastern philosophies. Buddhism encourages an openness to the richness and complexity of our deeper selves, and therefore invites students to be open to more within themselves, by example. Confucianism helps us understand how mutual respect between teacher and student is an important characteristic of a classroom in which the students feel sufficiently safe to respond to teachers' invitations. Empathy and altruism modeled by the teacher encourage a reciprocity in student expression of similar values. Taoism illustrates the very openness to natural growth within the student that is the essence of invitational education. Discipline need not be control against the student; it can be an attempt to guide the student to achieving greater self-control by meeting his or her own needs. Finally, Zen Buddhism illustrates the respect for silence that allows the less verbal students to share along with their more confident peers.

Practical applications for invitational education include:

- sharing more of one's inner self with students as a model for openness (Buddhism);
- garnering respect from students by respecting each one as an individual and expressing appreciation for the efforts of the class as a whole (Confucianism);
- yielding to demands for attention by allowing the student to learn to obtain "constructive" attention (Taoism); and
- nurturing the use and enjoyment of silent moments when deep reflection can take place, allowing for the quieter students to respond (Zen Buddhism).

Invitational education is a young movement. Appreciation of traditional eastern philosophies can help root it to a historical framework and stimulate a curiosity as to similarities with other philosophies. This may help us understand the underlying value of an approach that will hopefully expand with time. As well, studying the similar values and assumptions of traditional philosophies can help us feel more confident in the application of invitational principles in the classroom.

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Adapting the 5-P Relay
for
Inviting Quality Family Time

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The invitational approach encourages a personal and professional perspective on healthy living (Purkey & Novak, 1984). In this paper, I present how the invitational view was applied to transform a part of my personal life by inviting quality family time for beneficial growth and development. By applying the invitational approach to this area of living, I hoped that we would transform our family time from a schedule in which much energy and time was wasted to a plan full of enjoyment and optimal experiences (Csikszentmihalyi 1990).

To begin the process of inviting family time it was important for my husband and me to review how we had been handling family time by assessing our shortcomings and negative habits. We concluded that the family spent too much time in front of the television, because during the long winter months we were indoors a great deal with nothing else to do.

Csikszentmihalyi (1990) stated that, "free time...is unstructured, and requires much greater effort to be shaped into something that can be enjoyed" (p. 162). We had not been structuring our family time except for certain weekend activities and as a result, we had fallen into a very inactive and dull routine for our family time during the week and for part of the weekend. Since I initiated the process, I undertook the task of discovering how we could go about structuring our family time

and what aspects and factors we should consider to ensure an enjoyable outcome for my husband, our year-old son, and myself.

Adapting the 5-P Relay

After a review of the literature on family time and enjoyment, I searched for a framework in which to continue the process of inviting quality family time. I employed a modified version of Purkey's (1993) 5-P Relay approach to creating an inviting school. Since I was applying this approach in my personal life and not to school life, I substituted Quality Family Time for the 5-P's in Purkey's approach: People, Places, Policies, Programs, and Processes, and applied the five relay tasks under the headings: Goals, Procedures, Obstacles, Overcoming Obstacles, and Evaluation. Instead of a relay, these five tasks were planned over two weeks in which my husband and I worked on each assignment together.

Throughout this process we carefully considered how this affected our year old son who was too young to contribute at this time. This process led us to an action plan where we met as a family and held regular family meetings to ensure that we accomplished our goals. Following is an outline of how we applied this approach to our unique situation with a detailed reference about why and how we set specific goals for transforming our family time.

Goals and Procedures

The first task involved listing goals for inviting quality family time and listing specific procedures for accomplishing these goals. We immediately ran into difficulties because we had too many goals and we knew that if we made this part too difficult we would be setting ourselves up for failure. So, we limited it to five important and attainable goals that we could modify along the way. New goals could be added at a later date. The five goals we listed were to:

1. Limit television viewing time and to become active during television viewing time.
2. Work on developing family closeness or intimacy.
3. Be actively involved in Dylan's (our son's) play-time with Dylan leading the way.
4. Designate one evening a week as Family Games' Night.
5. Pursue a new family activity at least once a month.

Csikszentmihalyi (1990) stated that, "the best moments [of our lives] usually occur when a person's body or mind is stretched to its limits in a voluntary effort to accomplish something difficult and worthwhile" (p. 3). Yet, television viewing is very passive and requires little effort. That is why we found it so boring and dull. Thus, we limited our television viewing time to one hour a night with the exception of my husband who could watch one or two sporting events a week such as a hockey game. In addition, we designated one evening a week as the "No television viewing night." We also considered the idea of making the time that we watched television less passive by talking about the events occurring on the screen with each other, or by talking at the television itself, thereby taking greater control over the impact that television viewing had on our lives.

Our son was just beginning to show an interest in the television, so we limited his television watching to ten or fifteen minute intervals a couple of times a week. This time was during a specific children's show in which there was much singing and action, and Dylan enjoyed moving along with the characters. We encouraged him to be an active and selective viewer from the start. The procedure for accomplishing this goal was to turn the television off, and the implementation of the other four goals helped to fill the silent void and ease the temptation to turn the television back on. Although it was easy for us to limit our viewing time, we did find it difficult to pinpoint one evening as the "no television night" because of the sports events. Hence, we decided to keep it open to one evening a week, and if we had not chosen a night by Saturday night, then it was Saturday night.

The second goal involved working at keeping the family close. Although we are a very affectionate and loving family, it was important

to us to continue to work at keeping the family close and intimate at all levels. Benton (1983) has identified a number of ways that have helped families keep close. These include ideas such as, "Holding an honor night for a particular member of the family..., Seeking solutions rather than problems..., Experiencing the joy of creating together..." (p. 42), "Holding regular family councils...." (p. 70), "Telling a story 'just for you" (p. 81), and "Build[ing] family traditions" (p.111). We incorporated this element of "keeping the family close" into our family meetings, which we held Sunday mornings after breakfast.

Each week we reviewed any activities in which we had participated to help keep family closeness. After the first two weeks, it became apparent that we needed to do more discussing on the issue and we needed to plan the activities for the upcoming week instead of just waiting or expecting them to happen.

The third goal involved structuring quality family time for our son. To accomplish this goal we read about the development of young children. We based our initial discussions on two books written by David Elkind: Miseducation: Preschoolers at Risk (1987) and The Hurried Child: Growing Up Too Fast Too Soon (1988). The premise of both of these books is the idea that "education is not a race" (Elkind, 1987, p. 83). Instead, it is important to include play in a child's educational development because as Elkind (1987) noted, "... if we make ample provisions for children to engage in a variety of play activities without making them into something they are not or evaluating the children's productions, we contribute to their sense of competence" (p. 157). He warned parents of the negative consequences of pressuring children to grow up too fast through activities such as early reading programs (Elkind, 1988).

Consequently, we proposed to spend more time playing with Dylan during the evening. However, what we did was based on his interests and his attention span, not ours. For example, when he went to the piano and banged on the keys, we engaged in a family sing-a-long, or when he became totally engaged in an activity by himself, we provided him with time and space to play, explore and discover on his own. This did not mean that we neglected his learning in new and varied areas, such as providing him with ample books to browse when he showed an

interest. Still, these activities were always based on the philosophy of, "...responding appropriately to [Dylan's] demands for information" (Elkind, 1987, p. 185), and responding appropriately to his developmental stage and steering away from early academic programs. Through the procedure of reading, discussing and implementing, we provided quality family time for our son.

The purpose of the fourth goal, which involved the idea of having a games' night was to provide an activity when we could have fun together. Pearsall (1990) discussed the importance of learning to be happy together and laughing together. He stated, "Laugh, and your family will laugh with you. Cry, and your family will cry with you. Intentionally bringing humor to the family system helps to provide a balance between the tears of laughter and sorrow that run through our life" (Pearsall, 1990, p. 279).

Although we tried to do this on a daily basis, we wanted to broaden this experience. The games' night was something my husband and I could partake in after our son went to bed. This provided us with an alternative to watching television. We started the process with board games and computer games and then expanded it to include new games.

The final goal involved exploring new activities for the family. It included activities such as painting a mural together, trying out a new restaurant or new cuisine, finding the best creative playground in our part of the city, and reading a book together. Often when children are young, one parent reads to the child; but we did this as a threesome. All of these activities were designed to promote our family's creativity; another idea espoused by Pearsall (1990).

This goal as well as the others encourages the idea of lifelong learning. Lifelong learning is an idea emphasized in two publications by the Ministry of Supply and Services of Canada (1991): "The Prosperity Initiative," and "Learning Well ... Living Well." These documents examined "some of the challenges facing our economy... and ... questions about our learning system" (p.3).

The idea of extending learning beyond the classroom or schools was a major focus. Not only were we improving our family time, but we were replicating what the Canadian studies had found was needed for our society. We were expanding our growth beyond the personal level by sharing our experiences with other families, and because my husband and I are both teachers we were able to share these experiences with our students.

Obstacles

The second task involved studying the goals and procedures, and listing the obstacles that might prevent these goals from being accomplished. The obstacles that we listed included:

1. Starting enthusiastically but quickly loosing interest before new habits were embodied.
2. Coming home from work tired and lacking the energy to implement our goals.
3. When times were stressed, resorting to old habits such as television viewing.
4. Disagreeing over the goals to be set and how and why they should be accomplished.
5. Distractions such as going out to shovel the snow before our family meetings on Sunday mornings, unexpected company, or other time commitments.

Another task involved listing ways to overcome these obstacles. To overcome the first obstacle we set specific time frames over six months to encourage us to continue the process of inviting quality family time. These time frames were reset every six months for as long as they were needed. This was also a good time to review our goals and set new challenges to help keep up our interest.

The second obstacle involved being too tired, but we discovered that we could overcome this obstacle by allowing each family member some quiet time during the evening to allow us to recharge battery in any way we saw fit. For myself, it included some Yoga exercises such as deep breathing and stretching.

To overcome the third obstacle, it was important that we not be too hard on each other during stressful times and to allow for certain lapses, while ensuring a return to our goals once the stress level decreased. This return was initiated by a celebration dinner of surviving the stressful period and continuing the process of accomplishing our goals. When we found that the stress lingered on, it was time to review our lives and see how we could reduce the stress first.

Overcoming the fourth obstacle of disagreement about our goals, and how and when we should accomplish them, involved communication: listening to each other and working through these conflicts until we resolved them. The key was not to let the conflicts dictate the outcome of our family meetings, but use them as learning experiences. At times we either had to do more reading on the conflict issue or we set the conflict issue aside and got on with the process. In this way we decided to deal with the conflict at a later date. A conflict could stall our plans, but could not halt the process of inviting quality family time.

The fifth obstacle involved distractions, but as we became involved in the process we noticed our commitment deepen. Therefore, it became harder for the distractions to interfere with our work on improving our family time. We reviewed our time commitments daily to ensure that we allowed a little time each day to work on this issue. When one member of the family was constantly distracted, we reviewed the reasons behind such avoidance, and worked towards helping that family member feel more comfortable with the process.

Evaluation

Another task involved listing ways to evaluate whether we had achieved each goal. Rather than listing specific criteria for evaluating each goal outcome, we used Csikszentmihalyi's (1990) seven elements of enjoyment for the basis of our evaluation. These elements included:

1. A challenging activity that requires skills
2. A merging of action and awareness
3. Clear goals and feedback

4. Concentration on the task at hand
5. The paradox of control
6. The loss of self-consciousness
7. The transformation of time (Csikszentmihalyi, 1990, p. 49-67).

Since the purpose for transforming our family time was to increase our enjoyment and enhance our experiences together, we felt that the best way to evaluate our goals would be to review these seven elements of enjoyment at our weekly family meetings. By doing so, we would see if anyone had experienced any of these elements during the activities to transform our family time. Initially this was a simple process, but it became more complicated as we tried to attain our goals while experiencing all seven elements of enjoyment in each activity. We felt that it was important not to evaluate during our activities because then we would be unable to become totally immersed in our activity. We did, however, reflect on the experiences at any time during the process. When we found that we had not experienced greater joy and togetherness during a week, we reviewed the goals as well as the activities and made adjustments accordingly.

The final step in this adaptation of the 5-P Replay involved an action plan in which we set time-lines and assigned responsibilities. Since our son was only a year old when we began, these tasks rested on my husband's and my shoulders. Because I initiated the process, I undertook most of the readings and responsibility for setting the plan, transforming our family time, and implementing it, although my husband contributed to various discussions during this process. The responsibility was shared more evenly between the two of us once the family was fully engaged in the process.

Conclusion

We began experiencing greater enjoyment as a family unit as soon as we started the process. In part, this was because we had to spend more time together discussing related issues and working on implementing the plan. This encouraged us to delve into the area even deeper, which in turn gave us a sense of accomplishment and helped us to transform our family time by increasing worthwhile and optimal experiences. Although there were down periods, it became more difficult to slip into old unproductive habits because the quality of our family time had improved, and we were

no longer willing to settle for family time in which energy and time were wasted.

Purkey's (1993) 5-P Relay approach gave us a vehicle not only for starting but also for continuing the process. It could be modified along the way and included time-frames that helped us stay on task until new habits were embodied by the family and the process became a regular part of our family time. Moreover, we became aware of how the continuation of this process would benefit the family as we continued to engage in activities for improving our personal lives as lifelong learners. I hope that this article will encourage others to initiate discussion and action on how to invite healthy living from a personal and professional perspective. The 5-P Relay has value for many types of institutions, as demonstrated by my family in our effort to improve family time.

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Book Review—

Invitational Teaching, Learning and Living by William Watson Purkey
and Paula Helen Stanley. Washington, DC: National Education
Association. 1991. (paperback)

Purkey and Stanley embrace the encircling issues of school reform by
beginning Invitational Teaching, Learning and Living with a warning that
the mind is but one part of the whole person. They remind us that the heart
cannot be forgotten in the process of change, nor can the classroom be
overlooked as the essential environment that supports positive learning
experiences.

As is typical in most of Purkey's work, a clear and concise overview of
"invitational thinking" is presented in this book. The four basic elements
of invitational theory are described carefully and with examples
appropriate to the classroom teacher. A new addition to the invitational
literature is the "IDEA" inclusion. Throughout the book, there are specific
examples, practices, reminders, and suggestions that are called: IDEA.
The acronym stands for I = inviting, D = Descriptors of, E = Exciting, and
A = Activities. Teachers will find the IDEA approach a very useful one, as
the suggestions are both specific and practical.

Chapter Three focuses upon the four levels of professional
functioning. Readers who have delved into invitational literature will find
that the description of the four levels sound familiar. In fact, there is
substantially little difference in the treatment of the four levels in this text
from other works produced by Purkey and his associates (Purkey &
Novak, 1984; Purkey & Schmidt, 1987). Readers who need a review of
the levels of functions and examples for teacher-student relationships will
find this chapter provides a satisfactory summary. However, this reviewer
found little that was new or expanded in this section. The authors might
have considered a more extensive description of the functions with
application in the classroom as the primary focus of this chapter.
Differentiating between how the levels would affect various roles in
education might have been an interesting addition.

The remainder of the book highlights the Four Corner Press, the
Powerful 5 Ps, and the Rule of the Five Cs. Though the Four Corner Press
is best known for its basketball connection, Purkey and Stanley relate

personal and professional invitations with the same gusto shown by a well-drilled team. It is their contention that teachers often overlook the tremendous effect of the untapped potential inside each individual student. Focusing on ways to capitalize on this strength, identifying important feelings, strengthening friendships, and staying alive professionally are a few of the issues masterfully examined in the last half of the book. The "5 Ps" again review basic invitational concepts of people, places, policies, programs and processes. There is less space provided for these topics, yet the treatment of the "5 Ps" is adequate. The "5 Cs," which deal with concern, confer, consult, confront, and combat, provide important cues for the classroom teacher to assess at different points of decision making and interaction with students. The hints in this last section are truly helpful in times of stress. It is a section to be read several times to remind us of such simple ideas as: "Try not to make decisions when you are Hungry, Angry, Lonely, or Tired." It is too easy to overreact or use poor judgment in those cases. The authors point out that the first letter of each word spell HALT. In this section, the suggestions related to HALT are practical reminders for teachers to stop and think before they act.

Purkey and Stanley attempt to reach an important audience with this book. Every classroom teacher would love to summon all the wisdom developed between its cover, and be successful in the classroom. This work provides both the impetus and research to support an approach to school reform that attends to the whole person and includes an understanding of the multiple invitations that influence student learning and development. This is an uplifting book, one to be included in every school's professional library.

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The Journal for Invitational Theory and Practice promotes the tenets of invitational learning, self-concept theory, and perceptual psychology. Articles that examine and expand the theory of invitational learning and development, investigate the efficacy of invitational practices, and relate these beliefs and findings to other theories of human development and behavior are encouraged.

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