

## **Organizational Learning in Action: Becoming an Inviting School**

Donna R. Thompson, M.S., M.Ed.  
*McGregor, Texas*

*Public schools have met with increasingly unfavorable reaction in recent years, while private schools, magnet schools and charter schools seem to be gaining interest and public support. This may be due, in part, to the fact that public schools seem to lack a welcoming atmosphere. This action research study examined how teachers and an administrator at an elementary school in Texas used organizational learning strategies to implement the philosophy of invitational education on their campus in an effort to create a more welcoming climate.*

### **Defining the Learning Organization**

Bierema (1999) defined a learning organization as a “process that challenges employees and communities to use their collective intelligence, ability to learn, and creativity to transform existing systems” (p. 46). Simply put, Watkins and Marsick (1993) described the learning organization as “one that learns continuously and can transform itself” (p. 8). The organization does not settle for the status quo; it looks for ways to bring about improvement in its functioning. Senge (1990) characterized the learning organization as one where “people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free and where people are continually learning how to learn together” (p. 3). Furthermore, he claimed the learning organization is “continually expanding its capacity to create its future” (p. 14).

## **Learning at All Levels**

Senge (1990) stated, "The organizations that will truly excel in the future will be the organizations that discover how to tap people's commitment and capacity to learn at *all* levels in an organization" (p. 4). This type of school encourages and supports learning for teachers and administrators as well as for students (Becerra-Fernandez & Stevenson, 2001; Quicke, 2000). Barth (1990) agreed that schools should be communities of learners, places "where all participants—teachers, principals, parents, and students—engage in learning and teaching" (p. 43).

## **The Need for Organizational Learning**

Certainly, there is a preponderance of evidence that the world is undergoing radical change at breakneck speeds. Hargreaves (1994) described the effects of globalization in the postmodern world. Herein lies the problem facing schools today: "When the rate of change outside an organization is greater than the rate of change inside, the continuing existence of that organization is threatened" (Schlechty, 2001, p. 1). Bridges (2003) claimed, "Change is the name of the game today, and organizations that can't change quickly aren't going to be around for long" (p. x). Hall and Hord (2001) supported the position that schools must possess the cultural attributes of a learning organization if real and continuous change and improvement are to be obtained. In fact, Schwandt and Marquardt (2000) warned against the fate of those organizations that fail to keep up with the world's fast pace of change. They stated:

Within the next 10 years only learning organizations will survive. Companies that do not become learning organizations will soon go the way of the dinosaur: die, because they were unable to adjust quickly enough to the changing environment around them (p. 2).

Furthermore, learning organizations are concerned with more than simple cosmetic changes and shallow learning; they engage in double-loop learning whereby deeper structures are examined and questioned and changed when change is indicated as necessary (Scribner, Cockrell, Cockrell, & Valentine, 1999).

### **Characteristics and Components**

Workers in a learning organization are intentional in efforts to “reflect, research, collaborate, and innovate” (Zederayko & Ward, 1999, p. 35). Watkins and Marsick (1993) list the *Seven C’s* of a learning organization as continuous, collaborative, connected, collective, creative, captured, and codified. In an interview with O’Neil (1995), Peter Senge stressed that learning is a process that is always “on-the-job” (p. 20) in that it is always put into action in the context of one’s work. He also indicated that the learning process “always occurs over time” (p. 23) requiring continuous attention and practice. Schein (1996) indicated that the modern learning organization must be engaged in “perpetual learning” (p. 67).

Many studies have found that transformational leadership is a key component of the learning organization (Lam, 2002; Leithwood, Jantzi, & Steinbach, 1998; Silins, Mulford, & Zarins, 2002). Lam suggested, “But it is the internal school conditions, notably, transformational leaders, school culture and school structure that have exert[ed] the decisive influence on school transition” (p. 440). The leader of the learning organization must be a role model in the process of learning (Senge, 1996). Senge (1996) stated, “In brief, we are coming to believe that leaders are those people who ‘walk ahead,’ people who are genuinely committed to deep change in themselves and in their organizations. They lead through developing new skills, capabilities, and understandings” (p. 45). Scribner and Reyes (1999) suggested that the principal of the

learning organization should “model open communications,  
enable others to learn, work long hours, and

listen-listen-listen” (p. 199). In addition, Becerra-Fernandez and Stevenson (2001) indicated that the modern school principal provides practical support and leadership by organizing and providing the necessary resources to support the identified purposes, programs and plans.

Collective learning is also descriptive of the learning organization but should not be equated with the professional development of individual staff members. Leithwood, Leonard, and Sharratt (1998) proposed that, “Collective learning is not just the sum of individual learning, even though individual learning is a necessary part of collective learning” (p. 245). They explained:

As other team members adapt their contributions not only in response to their sense of the team’s new challenge but also in response to the responses of other members, each team member learns about the adequacy of her initial response and perhaps the need to adapt further. This is the way in which the individual learns from the team (p. 247).

Senge, Kleiner, Roberts, Ross, and Smith (1994) referred to this collective learning as team learning and explained that it transformed “conversational and collective thinking skills, so that groups of people could reliably develop intelligence and ability greater than the sum of individual members’ talents” (p. 6).

A culture where members of the organization possess shared values and visions was also identified as being a hallmark of the learning organization (Leithwood, Jantzi, et al., 1998; Leithwood, Leonard, et al., 1998; Senge et al., 1994). Leithwood, Leonard, et al. (1998) stated, “To foster OL [organizational learning] in schools, district visions and missions also had to engender a sense of commitment on the part of school staffs” (p. 260). Leithwood, Jantzi, et al. (1998)

added, “A coherent sense of direction for the school is crucial in fostering organizational learning” (p. 88). The various members of the learning organization need to have a shared vision so that they are learning and moving in the same direction.

### **A Philosophy Built on Caring.**

Many of those interested and invested in education (Barth, 1990; Beck, 1994; Noddings, 1992; Sergiovanni, 1992) join in issuing “a special call to educators to recognize and practice a caring ethic” (Beck, p. 1). The philosophy of invitational education, which originated with William Watson Purkey and some of his associates, echoes this call. The work and study of these scholars and researchers evolved into a model of practice called invitational theory. As Purkey and Novak (1996) stated, “Invitational education is... a general framework for thinking and acting about what is believed to be worthwhile in schools” (pp. 2-3). It is a “democratically oriented, perceptually anchored, self-concept approach to the educative process” (p. 3) with evidences of an ethic of caring. It is “education with a heart” (Purkey and Novak, 1998, p. 42). Purkey and Novak (1996) propose that:

...educators can create and maintain schools that cordially summon all involved in the educative process to value themselves and their abilities, to think more fully and deeply about issues of personal and social concern, and to act imaginatively and caringly in addressing matters of human worth (p. 2).

### **Foundational Beliefs**

Invitational theory (Purkey & Novak, 1988; Purkey & Schmidt, 1990; Purkey & Stanley, 1991) is a “fresh conception of education – forming a new image of what teachers can do and what schools can become” (Purkey & Stanley, p. 13). Invitational education seeks to provide a means of intention-

ally summoning people to realize their potential in all areas of worthwhile human endeavor. It is a “democratically oriented, perceptually anchored, self-concept approach to the educative process” (Purkey & Novak, 1996, p. 3). The aim of invitational theory is to “create an educational culture that summons everyone involved to become lifelong learners” (Purkey & Novak, 1996, p. 5). Invitational theory is based on three “cornerstone assumptions of invitational education: the perceptual tradition, self-concept theory, and democratic practice (Purkey & Novak, 1996, p. 19).

## **Problem Statement**

Public schools have been under close scrutiny and have been receiving increasing amounts of criticism in recent years (Sarason, 1990; Schlechty, 1997). Private schools, magnet schools, and charter schools are gaining interest and public support possibly because they are seen as more inviting to students, parents, and the community than are public schools (Eisner, 1991). Instructional leaders of schools are challenged to create schools that are learning organizations; schools that seek to learn and meet the increasing demands of their public stakeholders including the demand for a caring and inviting school climate. There is a need to identify practices and processes that lead to increased organizational learning and continuous improvement in creating an inviting climate.

## **Purpose of the Study**

Creekview Elementary ( a pseudonym) was already a great school. With quality teachers dedicated to the school’s mission, academic achievement for students was a driving goal as evidenced by the school’s ability to be named a “Recognized” campus by the Texas Education Agency for three consecutive years. The campus principal, however, saw a chance for Creekview to become even greater. When she saw sparks

of interest in the invitational education philosophy among her faculty, she determined to create a learning organization that would bring about a more inviting campus.

During faculty meetings, a plan was made to implement reform efforts in the areas of people, places, processes, programs, and policies in order to create a more inviting school. Over the course of the next 2 years, the plan was implemented. Intentional efforts sponsored by the committee and carried out by the faculty and staff were made to make the campus more inviting. In March, 2002, members of the campus' Invitational Education Committee compiled a portfolio/scrapbook which was entered in the International Alliance for Invitational Education (IAIE) competition for the Inviting Schools Award. Creekview was named a winner of the Inviting Schools Award in the elementary school division in June, 2002, and was honored at the IAIE conference in Atlanta, Georgia, in October, 2002. The purpose of this study was to identify the practices and processes that contributed to the success of this reform effort.

## **Research Questions**

The research questions which guided this study were:

- What organizational learning practices and processes contributed to the success of the reform effort?
- What were the leadership acts that contributed to the reform's success?

## **Context of the Study**

Creekview Elementary was built in 1973. Currently serving grades 3 through 5 it was initially a pre-kindergarten through sixth grade campus. The campus, situated in an affluent residential neighborhood in a mid-sized city in East Texas, was originally built on an "open classroom" model ba-



sically without inside walls to separate classrooms, cafeteria, or library. In later years, walls were added inside the

building. The campus also added two additional wings, a new library, and a gymnasium.

Creekview Elementary believes every child can become a confident, self-directed, lifelong learner. The mission of the campus was that the teachers, administration, staff, parents, community, and students work together to create a safe, orderly and inviting environment that allows optimal learning for all students (Creekview Elementary Campus Plan, 2002). In 2000-2001, the school enrolled 345 students across the three grade levels. The ethnic makeup of the student population was representative of the general population in Riverside. At the time of this study, the school had been led by four principals in the years since 1973. The current principal Mary Eliza Bowling (a pseudonym) had held the principal's position at Creekview for 13 years. Creekview Elementary employed approximately 30 professional staff including teachers, a librarian, a counselor, and a principal as well as seven educational aides.

Creekview was one of the city's three elementary schools to achieve a rating of "Recognized" by Texas Education Agency each year between 1999-2002 as a result of student performance on state-mandated assessments. This meant that at least 80% of all ethnic subpopulations had achieved passing scores on all sections of the Texas Assessment of Academic Skills (TAAS).

### **Introduction of Invitational Education at Creekview**

In August, 2000, William Purkey provided the keynote address for Riverside Independent School District's pre-service staff development opening assembly. Members of Creekview's faculty and staff appreciated the message of Purkey's presentation. Creekview's principal noted the faculty's interest in Purkey's philosophy. The principal talked with

members of the faculty and staff to determine who would be interested in attending the International Alliance for Invitational Education (IAIE) conference. Eight faculty and staff attended and brought back important learning which they shared with the faculty in a series of after-school faculty meetings. These faculty members became known as the Invitational Education Committee at Creekview Elementary. With principal's leadership, the Invitational Education Committee created a shared vision toward transforming Creekview Elementary into an invitational school.

## **Design of the Study**

This study used a qualitative research design employing the interview research technique as the major tool in gathering the necessary data for analysis. Pseudonyms were assigned to participants as well as to the city, campus, and school district. The study involved interviews of teachers and the campus principal. The participants' length of employment in an educational setting ranged from 18 years to 31 years. The study was conducted during the Fall semester of the 2002-2003 school year. A review of documents such as the Texas Education Agency AEIS report, the campus plan, and the Creekview Inviting Schools' scrapbook was also conducted.

Semi-structured interview questions were developed by the researcher and used to determine the effects of reform efforts through organizational learning. Data from each source were coded, categorized, and analyzed for patterns of meaning. A constant comparison of the data generated from interviews and document reviews during the course of the study enabled the researcher to look for recurring patterns in the data which converged into meaningful categories. The researcher created trustworthiness through triangulation by the collection of multiple types of data such as interviews and various document reviews.

The review of the literature revealed that learning organizations are characteristically collaborative in nature. Certainly, the invitational philosophy is also built on a foundation of collaborative activity (Purkey and Novak, 1996). Respondants noted that working together on committees and as teams was a key factor in the successful implementation of the reform effort at Creekview Elementary:

We have done grade-level planning, and I think that has helped to bring the grade levels together. And we've done a lot of teaming within the grade levels. We had those faculty meetings when we first came back, and we did little things that we had seen there [at the conference], and we shared.

The implementation was done first by the Committee that selected the tables and the wallpaper. They did it. It was not done by the principal. It was strictly done by teachers' committee... It was a campus movement. It was not strictly done from the principal's office.

Another theme that emerged from the remarks of those interviewed involved shared norms, values, and goals. These teachers noted that the organizational learning at Creekview was nurtured and encouraged because those involved shared values and a vision:

Initially, when they came back from the first conference, we had presentations. The campus was broken up into the parts of programs, policies, procedures, and so forth, and each group of teachers wrote down the things they would like to see...the improvements they would like to see ...visually on chart paper.

It was just a bonding experience for us... realizing that we all have the same goals, and that when we came back, we could implement them in our own way, but yet still using the philosophy of invitational schools.

Another respondent talked about the shared values also: "Working with the committee, I think it was a cohesiveness. We just felt like we were part of a group that we all had the same goal in mind, and that's what I enjoyed about it."

Leaders can either encourage and nurture organizational learning, or they can squelch and kill it before it even takes root. The role they play appears to be vital, and it appears to be two-fold. Respondents mentioned two broad areas in which their leader provided the support that they felt was necessary for successful implementation of the reform efforts they undertook. One area was with regards to support for teachers' ideas as indicated by these remarks:

She [the principal] has encouraged us to do everything that we've wanted to do. I knew that she had bought into it when she wanted to go on the trip [to the conference] this year...that she knew how important it was. I think she saw a big change in all of us.

[The principal] is always supportive of faculty and her students. She's always looking for ways to improve, so when we came with these ideas and suggestions, she was very willing to work with us...

The principal described her own role in this way, "I served, really more than anything, as the encourager."

Respondents were quick to mention another way in which leaders were needed, that being in the area of practical support. One respondent said that the principal worked "to get us money and time and whatever we needed to get these things started." Another said:

She's supported us in any way she can... with materials and supplies. Anything we couldn't come up with on our own, she's provided for us. Especially

providing for us to go to the conference for both years... that was a big step.

The principal also described the challenge of providing the practical support necessary for the organizational learning efforts. She stated:

The leadership in this particular initiative involved me being willing to look for funding for the first group of eight teachers [to attend the conference] which was a costly venture...but for me to be creative in funding...then a year and a half later, for the second group to go...Funding was a challenge. To take this large of a group to an international conference where there was a distance that required airfare.

### **The Expansion Effect**

The transformation of Creekview Elementary into a school that embraced the invitational education philosophy began with a spark of interest among a few teachers at a perfunctory in-service meeting. This spark of interest was heightened by a principal with a vision for the future. As the original group of teachers learned and practiced a new philosophy, interest in the philosophy of invitational education grew and spread among the group's co-workers. The following remarks by those interviewed illustrate the expansion effect of organizational learning:

It was not a decision. We just came back and did it. I mean, we didn't say, "We're going to go back and we're...all going to try and 'warm up' our places." All of a sudden, these places just started appearing! And it snowballed! When someone saw what someone else had done to brighten up their area, then they would do something else.

We came back and presented that [invitational education philosophy] to our faculty and everybody bought into it...I think that having representatives on every grade level helped to bring the faculty and the staff closer together. We were able to share with each grade level the importance of being inviting. The philosophy was bought into by the whole faculty.

I think the practices that led to this effort being successful was really more of a process, because there was a team leader from each grade level that was a member of the Committee that made the initial trip to the first conference. When they shared the philosophy...they demonstrated the philosophy...and practiced it...then their team began to buy in to the philosophy of invitational education.

The real power of the change seemed to come from a very modest start wherein a few key players allowed learning to transform their thinking and their behaviors. Then they modeled and practiced the effects of that learning before their co-workers until there was “buy-in” and the co-workers joined the organizational learning process.

## **Recommendations**

There is much that educational leaders can learn from a review of organizational learning literature. These themes were supported by the interviews conducted in this action research study as well.

- Look for sparks of interest. Pay attention to comments made by teachers about staff development opportunities and new teaching strategies or materials. Encourage teachers to explore those opportunities in which they express an interest. Take advantage of that interest and energy to build motivation and commitment.

- Encourage collaboration. Allow teachers to share and work together creating an open door for the de-privatization of practice. When teachers learn something of value and are able to share that knowledge with others, the very process of learning increases in power.
- Build on shared values and goals. Take every opportunity to focus the faculty and staff's attention on the school's mission. Build unity in purpose, values, and goals by constantly aligning conversation and action with the stated mission of the school.
- Support organizational learning both philosophically and practically. Not only is it important for the instructional leader of a campus to encourage staff to learn with positive words and an open mind, it is vital that the leader provide the practical means to allow that learning to take place. This can include providing opportunities for time away from duty for training or for team meetings. It may also involve locating funding for staff development opportunities or materials.

## **Conclusion**

When the principal at Creekview sensed an interest among some of her faculty members in the philosophy of invitational education, she saw the opportunity to initiate positive changes on her campus through organizational learning. The data revealed that Creekview Elementary benefited from the collaboration that took place as faculty members worked together on committees and as grade level teams. As grade level representatives shared the learning they gained through their attendance at the IAIE conference, the learning was passed from person to person among the faculty. Teachers noted that the organizational learning at Creekview Elementary was nurtured and encouraged because those faculty members involved shared values and a vision. They used words like "bonding" and "cohesiveness" when describing



their experiences and stated that the faculty “all had the same goal.” Furthermore, the data revealed

that campus leadership was vital in providing support, both philosophically and practically, to bring about the pragmatic reforms seen at Creekview Elementary. Not only did the principal welcome new ideas and suggestions borne out of the organizational learning, she also provided the financial backing to see that the ideas and suggestions were put into practice. She was “creative” in seeking funding to support her faculty’s attendance at two international conferences.

The transformation Creekview Elementary brought about by organizational learning began to take on an “expansion effect.” As the original group of teachers learned and practiced the new philosophy, interest in the philosophy of invitational education grew and spread among the group’s co-workers. One of the teachers interviewed described the expansion effect by saying that the implementation of the invitational education philosophy “snowballed” among faculty members. The real power of the change seemed to come from a very modest start which was nurtured by both the school leadership and followers in the form of teachers, students and parents. With a shared vision and an inviting stance, it seemed that anything was possible.

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*Donna R. Thompson is a Licensed Professional Counselor in Texas. Correspondence about this article may be sent to: ThingsAbove@aol.com*

## **Invitational Education at Cooper Elementary**

Ann W. Kalec  
*Cooper Elementary School  
Livonia Public School District  
Westland MI*

### **The Beginnings**

In the summer of 1998, I was appointed Principal at Cooper Elementary, one of 21 elementary schools in the Livonia Public Schools' district, the 5<sup>th</sup> largest district in the state of Michigan. Like many first-year principals, I was full of fresh ideas, lofty goals and endless enthusiasm to inspire students, staff and parents. My mandate: increase student achievement scores at the lowest performing school in the district.

Having taught at another elementary building in the district, I had always heard stories about Cooper, a "tough school" as my colleagues put it, with a reputation of unmotivated kids, uninvolved parents, and consistently low test scores. Cooper's student achievement scores on the Michigan Educational Assessment Program (MEAP) exams were significantly below district and state averages, and had shown little improvement for years. The highest recipient of Title 1 funds in the district, Cooper was in danger of losing its interim accreditation status or facing possible federal sanctions for low achievement.

Staff morale was at an all-time low. Teachers were working diligently to improve student performance but were not seeing the desired results on district or state assessments. Parent involvement was virtually non-existent, creating even greater challenges for staff. Students were frequently late,