

# **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:

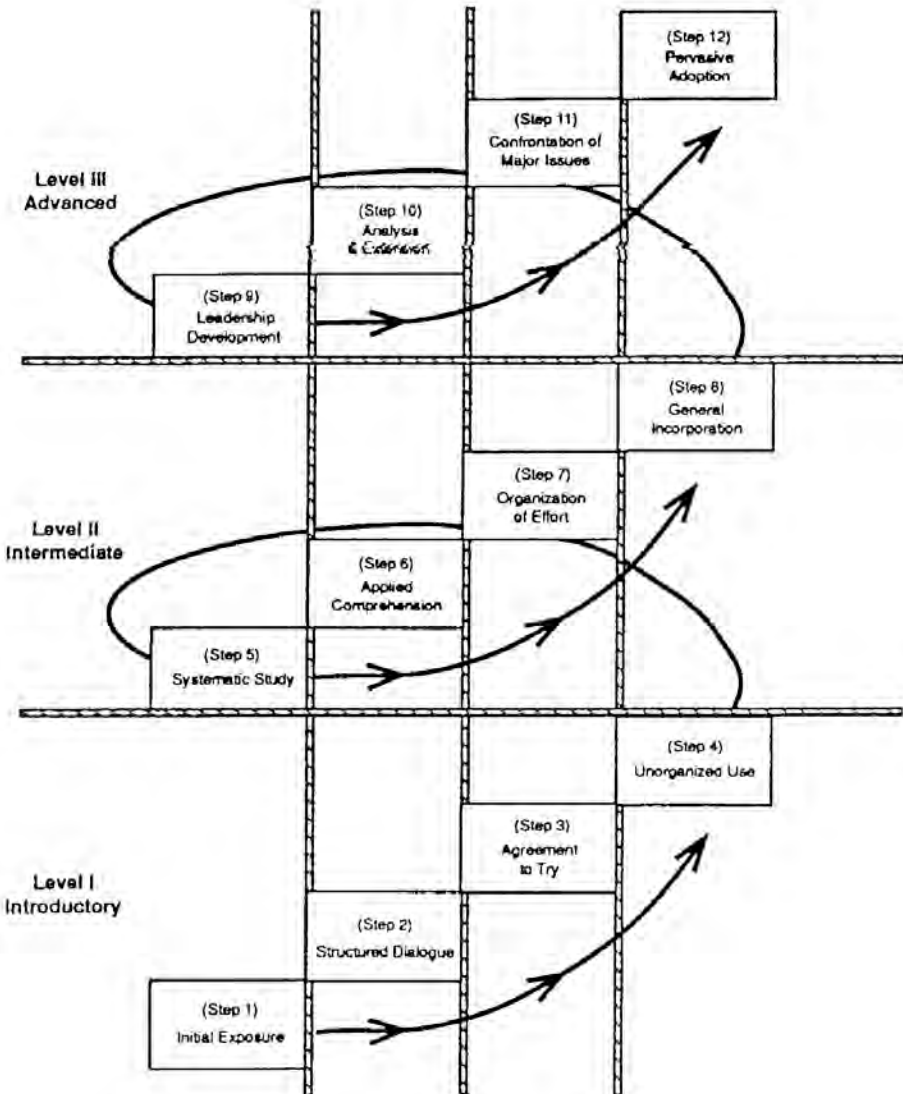
- Introductory (learning about the theory and practicing it at a surface level)
- Intermediate (moving from simple to more complex ways of understanding and practicing it)
- Advanced (comprehending its complexity and applying it to the most challenging concerns)

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

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## **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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