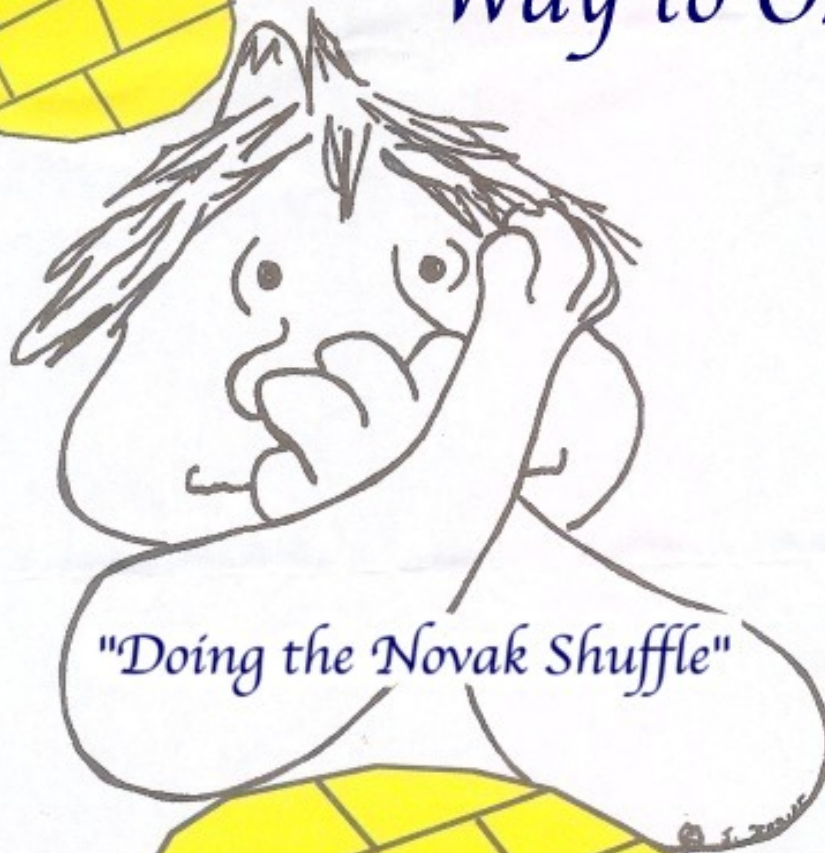


*"Lessons Learned  
on the  
Way to OZ"*



*Presented at the  
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Leadership Institute  
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Schmidt, J.J. (1997). *Making and Keeping Friends: Ready-to-Use Lessons, Stories, and Activities for Building Relationships*. San Francisco, CA Jossey-Bass (p.201)

## **Lessons Learned on the Way to Oz**

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### **Keynote Speech**

International Alliance of Invitational Education  
Leadership Institute  
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Thank you. It is a pleasure to speak at this opening session of a historic Institute of the International Alliance for Invitational Education. I realize that some of you might not know “Jack Schmidt.” So, I should explain that you might know me from the full name that appears on my books, “John J. Schmidt.” In fact, my full given name is John Joseph Michael Schmidt. Now, I see some of you moving your lips and some tapping your foot, so go ahead and get it out of your system. . . **John Jacob Jingleheimer Schmidt.**

In recognition of this association’s longevity and metaphorical attachment to the Wizard of Oz tale, I have titled my remarks “Lessons Learned on the Way to Oz.” I should tell you that Kate Asbill and I considered other titles such as “30 years on the Yellow Brick Road and What have We Learned?” to fit the Institute’s theme. I chose this title because first, we have learned much from Betty and William since they began talking about invitational teaching in the 1970s. Second, invitational education strives to create an Emerald City, that ideal place in the land of OZ, for every relationship, every school, every organization that wants to benefit humankind. So today, I want to highlight a couple of things learned since my first encounter with William Purkey in 1976. My hope is that by sharing these lessons, we might give them meaning so that the discussions and presentations experienced during our time together this weekend will be beneficial. This afternoon I share six ideas, lessons if you will, that have helped me to connect with Invitational Theory and Practice and have enriched my personal and professional life.

When we talk about being an invitational educator or professional, two influential factors come to mind immediately: perception and language. Both of these will be important to consider as I present my ideas this afternoon. Let me first say a few words about perception; it is a marvelous and mysterious process.

Now I choose the word mysterious not because we have difficulty understanding the perceptual process, but because we are often confused by how people perceive the same event differently. As an example, here we are at an Invitational Institute— colleagues, compadres, mentors, educators, friends, and researchers who are passionate about the basic tenets and principles of I.T. We come together this weekend because of a common bond. Yet, each of us perceives this theory or model of communication in slightly different ways, placing meaning and importance on various aspects of its philosophy. We learn the same constructs, read the same principles, and hear the same metaphors, yet come away with different understanding. Moreover, we find this phenomenon among people whom we try to convert. Sometimes we hear, “Oh that’s easy to do, to be inviting.” Yet, many who have worked with William, Betty, and John over the years know that it may look simple, but it is more complex than it appears. It may look easy, but it is challenging to apply the concepts and principles consistently.

In addition to understanding our perceptions, we sometimes struggle to find a clear language to express our ideas. This is the second lesson I have learned.

**Build** self-concept

**Motivate** students or staff. Motivation is a matter of choice. No person is unmotivated; he or she is simply not motivated in a direction others want the person to go!

**Doing to vs. Doing with**

**Natural born teacher** (natural born physicist)

Supermarket and natural parenting

(1) tyranny runs rampant

(2) listen to the natural phrases:

You know better than that! Sequential -

Am I going to have to tell you again?

I am not going to tell you again!

If I have to tell you one more time....

How many times do I have to tell you?

This afternoon please consider these two factors as lessons—perception and language—as we explore four additional lessons about being an inviting person and professional.

The third lesson is that invitational philosophy and practice can make a difference in organizations and schools. We have seen this time and again through our Inviting Schools Award. We also know this through the research by many people such as Bill Stafford, Charlotte Reed, Dean Fink, Lynette Trent, Kate Asbill, Patsy Paxton, Gary Chandler, Lundie Amos, Frank Pajares, Trudie Steyn, Paula Stanley, Tommie Radd, Salene Cowher, Jacobus Kok, John Piper and others. In my own research, I have also learned that young children can acquire invitational concepts. The book *Making and Keeping Friends* published in 1997 is a curriculum based on invitational theory and practice used by middle school teachers. Some teachers have reported to me that they noticed a positive difference in student behavior and class relationships when using the friendship curriculum.

At the same time, we know that these differences can be temporary. We have research by David Chapman that followed up with past Inviting Schools Award winners to find that only a small percent of schools responded. Of the 205 surveys mailed only 41 came back. In some of those schools invitational theory and practice were no longer important aspects of some schools. But, more important, what about the other 164 schools? So, what have we learned? As people leave organizations the invitational principles they espoused may often leave with them. The essential lesson is: People make the difference.

Speaking about schools, I can share another experience relative to perceptual differences. Many of us in the U.S. are disheartened by the emphasis our schools have given to standardized testing as a sole means of measuring student achievement and progress. I was discussing my disenchantment with a school counselor I was supervising for clinical practice, and she gave another perspective. She said, “Dr. Schmidt, I know how you feel about high stakes testing, but I have noticed that many of my parents who never came to school before, never seemed to care about how their children behaved and performed in school, are now coming and showing concern about how their children are doing.” She continued, “I think the testing program, with all its faults, has encouraged more parents to get involved in their children’s education.” Now, I still think our obsession with testing is wrong. However, this lesson, taught to me by an insightful school counselor, emphasizes another reason to encourage more research of invitational beliefs and practices. As William Purkey and others have often stated, EVERYTHING COUNTS. This is the fourth, and a most significant lesson I have learned. Nothing is neutral in the work we do; everything makes a positive or negative difference. Therefore, having research to support our claims gives us confidence that we will make only positive differences.

With much of the research, I have also learned that measurement of invitational concepts and inviting processes is at best imprecise. We have created several instruments to measure invitational concepts, such as the Inviting School Survey that examines the Five P’s of people, places, policies, programs, and

processes. While these instruments have given us a start, they need more attention. Frank Pajares noted in his research that their “continued refinement and use will reveal the extent to which invitations and disinvitations are related to key psychological and motivational constructs” (1999, p. 44). We also need more research on the effect of invitational processes with individuals. So, single subject and case study designs should be encouraged by students we advise and by practitioners who might contribute to our research efforts. If everything does count, we should be confident in the principles and processes encouraged by invitational education.

The fifth lesson I have learned is the cross-cultural and multinational acceptance of invitational theory and practice. At every Alliance conference in the past decade and more, we have celebrated with colleagues from across the globe, representing countries including South Africa, Australia, New Zealand, Hong Kong, Canada, Bermuda, and other places, not to mention a broad representation of states spanning the U.S. as far as Hawaii. Again, returning to our quest for research, we need to examine the efficacy of invitational assumptions and practices across cultures. For example, how does the notion of “doing with vs. doing to” play out across cultures? I am an advocate for finding the universals inherent in invitational theory and practice that we can apply across diverse cultures and between groups within cultures. At the same time, I recognize the implicit danger in searching for universal application of any educational or therapeutic approach. Even more reason to encourage cross-cultural research of invitational concepts. The Land of Oz is a diverse place. Can we be certain the invitational beliefs we hold so dear are acceptable to everyone?

Last, and perhaps most important of the lessons I have learned is that invitational theory and practice consists of a viable philosophy and a useful model of caring for oneself and others in genuine and authentic ways. This caring posture does not happen accidentally. Rather, it is anchored to our intentionality, a construct that allows us to act with both direction and purpose. Therefore, we not only know what we want to do, we know why we are doing it. We use optimism, respectfulness, and trustworthiness in a planned, purposeful manner to help people, institutions, and organizations move in positive directions. In sum, by being inviting professionals, we make beneficial things happen.

Linked to the process of making things happen intentionally are the first two lessons I shared this evening—perception and language. As noted, using all the ingredients of invitational learning successfully is not easy. Sometimes challenges seem insurmountable. On these occasions, we might lose what some might call our “presence of mind,” and become less intentional with our perceptions and self-talk, which William Purkey has taught us is the language we use to monitor our optimism, respect, trust, and intentionality. Losing one’s hold on intentionality is much like the worker who had an accident on the

job. This is an old story, first told I believe by a British orator in the 1950s. As the story is told, the man was a brick mason and he was responding to the compensation board's inquiry for clarification and more information about his reported accident. The brick mason wrote to the Board:

“Dear Sir:

I am writing in response to your request for additional information about my accident. On the accident reporting form in block #3, I wrote, ‘Trying to do the job alone,’ as the cause of my accident. You said in your letter that I should explain more fully, and I trust that the following details will be sufficient.

I am a bricklayer by trade. On the day of the accident, I was working alone on the roof of a new six-story building. When I completed my work, I discovered that I had about 500 pounds of brick left over. Rather than carry the bricks down by hand, I decided to lower them in a barrel by using a pulley, which fortunately was attached to the side of the building, at the sixth floor.

Securing the rope at ground level, I went up to the roof, swung the barrel out near the scaffold and loaded the bricks into it. Then, I went back to the ground and untied the rope, holding it tightly to insure a slow decent of the 500 pounds of brick. You will note in block # 11 of the accident reporting form that I weigh 135 pounds.

You can imagine my surprise of being jerked off the ground so suddenly, and consequently, I lost presence of mind and forgot to let go of the rope. Needless to say, I proceeded at a rather rapid rate up the side of the building.

In the vicinity of the third floor, I met the barrel coming down. This explains my fractured skull and broken collarbone.

Slowed only slightly, I continued my rapid ascent, not stopping until the fingers of my right hand were two knuckles deep into the pulley.

Fortunately, by this time I regained my presence of mind and was able to hold tightly to the rope in spite of great pain.

At approximately the same time, however, the barrel of bricks hit the ground—and the bottom fell out of the barrel. Free of the weight of the bricks, the barrel now weighed approximately 50 pounds.

I refer you again to my weight in block number 11. As you might imagine, I began a rapid descent down the side of the building.

In the vicinity of the third floor, I met the barrel coming up. This accounts for the two fractured ankles and the lacerations of my legs and lower body.

The encounter with the barrel slowed me enough to lessen my injuries when I fell onto the pile of bricks and fortunately, only three vertebrae were cracked.

I am sorry to report, however, that as I lay there on the bricks—in pain, unable to stand, and watching the empty barrel sway back and forth six stories above me—I again lost my presence of mind—I LET GO OF THE ROPE!”

Over the years as a member in the Alliance and traveling the Yellow Brick Road with many of you, I have learned much about myself and about how people form successful relationships. These are a few of the important lessons I have learned on the way to OZ and of course, I have not yet reached the Emerald City. I am still learning.

My wish for all of us in the Alliance is that when we find ourselves in challenging situations, we keep our presence of mind, our intentionality, continue to maintain optimism and respect, and trust ourselves and other people to use invitational concepts and practices only for the most beneficial purposes. I also hope that we continue our search for evidence of this theory’s value in educational and other human endeavors. Thank you for allowing me to share these ideas to start the institute.