

SCHOOL TRANSITIONS

Transitioning from a Traditional School Setting to a  
Montessori Learning Environment

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For the College of Education

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DEDICATION

To AnniePearl

May you never hear the words that you are not good enough.

You will always be good enough, as long as you believe in yourself and follow your dreams.

xoxoxo

mama

## ACKNOWLEDGEMENTS

Carl – From our very first date you knew I was not finished with my education and valued my educational drive. After a few wayward years of trying to find a balance of motherhood and professional goals, you granted me the perfect gift, the gift of time to focus on my goal of obtaining a doctorate degree. You unselfishly put my education first and you took on parenting and household challenges without complaint. From additional parenting duties, more household chores, and even taking care of my chickens, you demonstrated your unwavering dedication to my dream. You truly are an amazing spouse and without you by my side, I would not be where I am today. Thank you.

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Remember, mama knows best!)

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## CHAPTER I: INTRODUCTION

As I walked up the sidewalk, butterflies filled my stomach, and sweaty palms swung next to my sides. Starting the morning with these feelings can be overwhelming, but then to hear, “Good morning class, today we have a new student...” intensified these feelings even more. Due to my father’s career in the military, over the course of my twelve years in public and Department of Defense school settings, these unsettling yet familiar feelings flooded my body on five separate occasions. The familiar feeling of butterflies, sweaty palms, and shyness became all too familiar, but even with familiarity these feelings never truly lose their intensity.

Twenty years later, I felt the same unsettled feelings. But this time butterflies not only filled my belly but also the belly of the six-year old girl standing next to me, our sweaty palms entangled. I was not the little girl now, but rather an adult standing next to my own child, sharing her mutual apprehension of our own uncharted educational journey through Montessori philosophy and classroom practices.

One might assume that the first few transitions to an unfamiliar school would make subsequent transitions less daunting. In my own experiences, transitioning to a new school did not become easier. Entering unfamiliar school environments left me unnerved and filled with uncertainty, vulnerability, and a sense of isolation. Beyond my own experiences, we know from research that transitioning into an unfamiliar school requires active participation and involvement, patience, and the willingness to navigate uncertainties (Roybal, Thornton, & Usinger, 2014). Solid transitional activities and practices can promote a sense of belongingness and connectivity to the new learning environment and begin to ease transitional anxieties that are often felt by children and families (Bradshaw, Sudhinaraset, Mmari, & Blum, 2010). Without transitional activities, all of these pronounced yet often unacknowledged feelings can hinder

transition into an unfamiliar school, especially a school that does not follow a familiar schooling philosophy or practice (Yeo & Clarke, 2005).

Over the last year, reflective practice drove me to more fully consider transitional approaches that support children and families as they become more familiar with their new school setting. As our family transitioned from a familiar learning environment that aligned with a more traditional schooling approach into a new, unfamiliar one, we experienced feelings of uncertainty, tension, and disconnection. In order to calm unsettled personal feelings during this time of change, our family also needed to comprehend the overall philosophy and learning expectations within a Montessori learning community. Understanding the daily functions and routine of a school setting can differ from truly understanding the philosophical foundation and expectations a school promotes. Comprehension of daily functions, routines, and the guiding educational philosophy can ease transitions as one enters a new schooling environment (Giallo, Treyvaud, Matthews, & Kienhuis, 2010). In addition to understanding the new routines and practices within the new learning environment, Giallo et al. (2010) suggest that better transitional practices and adjustments are associated with more stability when building peer relationships and school attendance.

Noel (2011) states that the quality of transitions impacts the academic success of a child. Because of this, high-quality learning institutions should consider the need to employ highly qualified educators and support staff who understand quality transitional practices in order to support entering students (Kennedy, Cameron, & Greene, 2012). Furthermore, Noel (2011) explains that educators need to identify developmental characteristics and learning environment factors that are critical to a child's development. Not only do learning systems need to be aware of developmental milestones, but schools need to recognize that the quality of a child's transition

to an unfamiliar setting impacts the personal characteristics of the child (Noel, 2011).

Additionally, learning communities need to understand how the characteristics of a child, a child's living situation, and a child's past learning experiences come together to create a foundation for future school changes (Augst & Akos, 2009).

### **Transitions and Anxieties**

After several school transitions that I personally had to navigate in my schooling career, it became evident that transitional plans and activities might not be on the forefront thinking of school administrators and educators. Furthermore, as my own child transitioned from a more traditional school environment to a Montessori learning community, I began to reflect on my own feelings regarding transitional practices and activities. In addition to examining transitional practices, exploring the different roles of the school administration, educators, parents, and children prompted my interest in further research. Examining the limited research on transitioning practices and the differing roles within each transition solidified the need for further research.

### **Why Good Transitions Matter**

A successful transition is often evident when a child demonstrates enjoyment in the learning environment and has steady academic gains (Monkevicienė, Mishara, & Dufour, 2006). On the contrary, when a child does not experience successful transitions the result can be increased anxiety, decreased motivation to perform academically, negative attitudes toward the school setting and overall adaption limitations that can thwart the sense of belongingness and connectivity to the new environment (Roybal et al., 2014). Monkevicienė et al. (2006) found that several external factors can influence the success of a transition. The influence of external factors include: family characteristics, such as parental education, ethnicity, single parents, and

parents' intelligence and the climate and culture of the school which can include class size and curriculum. To promote a more positive transitional process, Giallo et al. (2010) state that along with orientation and school visits, parental involvement is a key factor during this period. In many cases, parental involvement is limited to interviewing the school when plausible, completing the enrollment process, returning required enrollment paperwork, and submitting (when applicable) tuition payments (Giallo et al., 2010). Limited parental involvement during this time can correlate to children not performing as well on academic requirements, experiencing reduced emotional well-being and increased engagement in more unsupervised activities, and having less regard for adult authority (Hanewald, 2013).

Parents who are invested in the transitional process tend to have children who use positive coping mechanisms, positive coping mechanisms include, involvement in sports, school-based activities, religious affiliations, and healthy relationships with peers (Monkeviciene et al., 2006). When children exhibit positive coping mechanisms, children have a greater tendency to perform higher academic achievements, are intrinsically motivated to excel in their academic careers, and view themselves as more competent compared to children who use negative coping mechanism (Monkeviciene et al., 2006). Furthermore, Giallo et al. (2010) explain the importance of a multi-faceted partnership between the new school setting, educators, parents, and the transitioning child. The transitional process should be “viewed as a process all partners experience rather than an event that happened only to the child” (Giallo et al., 2010, p. 2).

### **What Schools Can Do**

To further explain the need for sound transition activities and procedures, Hanewald (2013) states that a significant part of adjusting to a new learning environment is the sense of belonging and the child's overall level of well-being. If a student has a “high sense of belonging,

the feeling of social connection and being socially connected may lead to higher motivation and grades” (Hanewald, 2013, p. 64). Yeo and Clarke (2005) note that more often than not, schools tend to neglect and not recognize that there is an emotional aspect of transitions. Schools often look beyond the fact that parents are entrusting educators with their children in an unfamiliar learning environment (Yeo & Clarke, 2005). Furthermore, Yoe and Clarke (2005) promote the idea that educators need to be “proactive and by giving due recognition to children’s views and feelings about this major transition” (p. 1).

Transitional activities and practices can vary greatly among learning communities. Most learning environments focus on making a new child feel settled in a new school setting by organizing orientation sessions or school visits (Giallo et al., 2010). Orientation and school visits prior to the start of the school year or before a child moves to the new environment can allow the child and family to become acquainted with the new setting (Giallo et al., 2010). Orientation sessions and school visits can also alleviate the anxieties that are often associated with adjusting to a new physical building, understanding the overall culture and climate of a school, and the policies and procedures that govern the new learning community (Bradshaw et al., 2010). Giallo et al., (2010) state “it is important to note that such outcomes are better for children, especially boys, when they have had the opportunity to participate in a number of school transition activities (six or more) rather than a single event” (p. 2).

### **Focusing on the Student**

Transitioning to a new learning environment is a process and, in the end, the goal or product is to help the family experience a smooth transition that leaves its members feeling connected to the school and in possession of a true understanding of the schools’ philosophy and educational model. To further develop the notion of product and process, Schein (2010) notes

that “the culture of a group can now be defined as a pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration...” (p. 18). In using this definition, one can understand what occurs when new members of a group enter an existing, established culture and must adapt through a *process* in order to conform to the *product* of integrating into the existing culture within the group. Groups with long-term and stable members often share cultural expectations. The lack of shared assumptions within an unstable organization can damage both its members and culture (Schein, 2010). A culture within an existing school setting allows new families to assimilate into the school and understand cultural expectations. To support inclusionary practices, transition and communication practices need to support the cultural expectations of the learning community.

Once created and established, a shared culture within a group greatly determines the behavior and practices of the group. The rules and norms become embedded in the actions and behavior of members. When new members join, a socialization process should make certain that new members will understand and maintain the group’s culture (Schein, 2010). Through transitional activities and practices, groups ensure that new and existing members understand the roles and responsibilities of membership (Schein, 2010).

To help new students and their families understand classroom and cultural connections, a school needs to nurture a classroom community (Lash, 2008). Within the larger classroom community, several subcultures will tend to emerge. Children need a classroom environment that allows them to express themselves individually, express their unique personality, and have a safe place to empower themselves with the help of others. Classrooms not only have their own culture but children in a school setting have to contend with the overlying culture of the larger learning system and the underlying influence of peer culture (Lash, 2008). When examining

learning communities, one must understand how each cultural influence impacts the behaviors of students who are transitioning into a new environment. The new learning environment can cultivate adaptation and assimilation through the transition and communication practices it establishes while supporting the philosophy and educational model that supports the school environment.

As children progress through their academic careers, they “...encounter several key transitional points. These transitions generally coincide with the commencement of a new level of schooling: the beginning of elementary school, the move to middle grades, and the start of high school years” (Neild, 2009, p. 54). In addition to grade level transitions, Neild (2009) states transitioning to a new learning environment can occur due to factors such as, parental relocation for employment, changes in financial well-being, or academic or personal needs not fulfilled at the previous school setting. Malaspina and Rimm-Kaufman (2008) state, “School transitions are a pressing issue to practitioners; however, surprisingly little research exists about the extent to which school transitions pose a challenge and cause academic and social performance declines” (p. 1). Transitioning to a new school setting can provide opportunities for personal growth and nurture independence or in contrast transitions can pose academic and personal disequilibrium (Neild, 2009).

Malaspina and Rimm-Kaufman (2008) indicate when children transition later in their childhood or early in adolescence more transitional problems can arise. Factors that contribute to this include the overall size of the school building, class size, a less child-centered learning environment, more “impersonal relationships with teachers,” and an increase in academic and athletic competition (p.8). In addition to school environment changes and expectations, Malaspina and Rimm-Kaufman (2008) suggests that physical and biological changes within the

child can also greatly affect how a child transitions into a new school setting. Furthermore, demographic factors such as “gender, ethnicity, and mother’s education may contribute to an understanding of how students adapts to school transition” (p. 3). Roybal et al. (2014) assert that “the higher the number of stressors a student reported, the lower the level of school membership; however, when support from parents or friends increased, stressors decreased and school membership increased” (p. 475). Augst and Akos (2009) state that “transition planning is essential in schools in order to encourage academic achievement for all learners” (p.3).

### **Traditional Learning Environment and Transitional Experiences**

In order for children and families to more easily transition to their new learning environment, Augst and Akos (2009) argue that “if students and families are supported during these times of transitions, students will have more opportunities to be successful and schools will be initiating enhanced relationships with families from the start” (p. 4). To facilitate transitional ease between families and schools, establishing transitional activities can promote a more fluid and less anxiety ridden transitional process. LaCava (2005) suggests several different approaches that can make transitioning to a new school setting more successful.

The student should have as much autonomy as possible within the transition process. The collection of new information regarding the child and the family should be collected before the transition occurs. Transitional meetings and planning should take place throughout the year to guide families as they enter the learning environment during varied times in the school year. Staff training that focus on building relationships with new children and families should be offered to school staff. Lastly, transitions are an ongoing process that should be supported by patience and flexibility. (LaCava, 2005, pp.46-48)

The use of school counselors can also ease circumstances for children. Augst and Akos (2009) report the “transition into kindergarten and the transition from second to third grade are critical times in a child’s elementary school experience that are often overlooked” (p. 4).

Research indicates that kindergarten is one of the most significant transitions that elementary school students face. School counselors have a unique opportunity to support children and families as they become embedded in the new school setting (Augst & Akos, 2009).

Furthermore, school counselors can work with older children and families to more fully understand higher academic demands and expectations (LaCava, 2005).

Transitional activities and support teams can aid in lessening concerns for children and families. Malaspina and Rimm-Kaufman (2008) discuss differing academic, social, and individual attributes that influence transitional experiences and outcomes. Academic, social, and individual attributes “may protect students from experiencing the negative outcomes” from school transitions (Malaspina & Rimm-Kaufman, 2008, p. 4). Academic competence decreases stress levels of children as they transition to a new learning environment (Gelter, 2011). Furthermore, academic competence supports the notion of better attendance, fewer failed courses, and decreases in discipline referrals (Gelter, 2011). Social competency is directly related to academic competence (Malaspina & Rimm-Kaufman, 2008). Building new relationships with peers and members of the learning environment allows for the transitioning child to connect to the overall academic and social expectations of the school setting. Malaspina and Rimm-Kaufman (2008) report, “Social competence appears to be a predictor of academic achievement; students whose teachers and peers perceived them socially responsible earned higher grades, even when taking into account IQ, ethnicity, and family structure” (p.4). In order

for academic and social needs to be met to ensure transitional ease and a decrease in transitional anxiety, a collaborative effort from both families and schools should be established to promote academic and social success (Neild, 2009).

### **Purpose of the Study and Guiding Questions**

In addition to investigating transitional practices and methods, the examination of the school setting warrants exploration. When a child transitions from a traditional school setting into a Montessori-based school environment, additional transitional concerns can arise.

Enrollment in Montessori-based school settings has increased over the last several years (American Montessori Society, 2014). In response to this educational trend, it is important to understand the in-depth history and educational approach that is commonly referred to as *The Montessori Method*.

In over 100 years, Maria Montessori's educational vision and philosophy has fostered the practices of more than 22,000 schools within 110 countries worldwide (American Montessori Society, 2014).

Each year, families transition to Montessori environments from a variety of other educational approaches (American Montessori Society, 2014). To learn more about how families navigate and understand these transitions, and how the school supports and facilitates new families, this study examined families transitioning from a traditional learning model to the Montessori learning environment. Accordingly, the purpose of this study was to explore the experiences of families as they transition from a conventional school setting into a Montessori learning environment. The study was guided by three broad questions:

1. What transitional issues do the school administrator and staff anticipate and how do they plan for and address such concerns?

2. What transitional practices do families believe are most helpful with their transition into the Montessori learning environment?
3. How do families' expectations of the Montessori environment compare with their actual experiences in that environment?

The benefit of the study is to help fill a void that exists in research and the literature addressing such transitions. The study therefore contributed significance and benefits regarding transitional practices and approaches and provide an additional layer of knowledge to the research community. This new information can equip the educational community, families and school practitioners with strategies that may assist others as they make similar transitions.

## CHAPTER II

### REVIEW OF THE LITERATURE

#### **The Montessori Approach: A Brief History**

To develop a deeper understanding of the Montessori Method, the literature review includes four areas of focus. The first area of review provides a historical account of Maria Montessori's education and the development of Montessori education. The next consideration of literature focuses on The Eight Guiding Principles of Montessori Education and how each principle is reflected in best practices in early childhood education. The third section will provide a historical depiction and current logistics of a Montessori classroom. Lastly, the literature review will examine mitigating transitional challenges that may be felt by families as children transition from a non-Montessori school setting to a Montessori learning environment.

#### **Beginnings: The Education of Maria Montessori**

The Montessori approach was developed by Maria Montessori. Montessori, the only child of Alessandro Montessori and Renilde Stoppani was born August 31, 1870 in a Chiaravalle, Italy (Kramer, 1988). Montessori's parents held differing views on how they wanted Montessori's life work to unfold. This parental dichotomy provided Montessori with experiences and educational opportunities that many young children did not receive in Italy. Alessandro Montessori, known for his conservative upbringing and parenting, thought Montessori should focus on the traditional role of a woman and assume the role of a wife, mother, and if she chose, a career as a teacher. However, Renilde Stoppani differed in her parenting and ideals for Maria and encouraged Montessori to explore opportunities and not conform to the notion of the traditional woman and the expected role (McFarland & McFarland, 2011).

During the early years in Montessori's childhood, her family lived in Ancona, Italy, and she attended the state day school (Standing, 1957). Classroom materials were often lacking and the teachers who ran the state school did not have foundational knowledge of child development or sound curricula practices; this left the state day school less desirable (McFarland & McFarland, 2011). To combat the schools' inadequate selection of classroom materials and teaching practices, Maria Montessori began to question her teachers and requested advanced lessons (Kramer, 1988). Traditionally in Italy, children only attended school until the third grade. If given the opportunity to participate in school beyond third grade, boys and girls then attended classes in same sex schools. After third grade, the school curriculum focused on domestic activities for the girls and more technical accomplishments for the boys (McFarland & McFarland, 2011). Throughout formal schooling experiences, teachers did not view children as individuals or give attention to those who required additional assistance (Standing, 1957). This style of teaching bothered Montessori from a very young age, and she was not shy in voicing her concerns. Montessori often questioned her teachers and took on the role of the classroom caregiver and peacemaker (Kramer, 1988).

At the age of twelve, the family moved to Rome to give Maria a better education that would support her father's idea of Montessori becoming a teacher. Montessori quickly challenged the educational practices in Rome. Standing (1957) notes Montessori "already had her own ideas as to her own education" (p.23). When Montessori was 14 years old, she began to show an interest in mathematics; however, at the time, Montessori's parents did not foster educational opportunities that would allow her to excel in mathematics or a more advanced school curriculum. Instead, her parents continued to suggest she pursue a career in teaching. Montessori declined this suggestion from her parents and chose to focus on engineering (Kramer,

1988). Montessori enrolled in a school with all boys that focused on mathematics and engineering. Nonetheless, after a short time, Montessori's educational interest shifted again. This time she took an interest in biology (Standing, 1957). This transition was not common and, once again, Montessori took classes with all males. To add to her educational journey, Montessori decided that mathematics, engineering, and biology were not her true calling. Montessori shifted her attention to the study of medicine (Shephard, 1996). While met with resistance from the community and even her father, Montessori declared, "I know I shall become a Doctor of Medicine" (Standing, 1957, p. 24). Throughout medical school, her fellow students constantly reminded Montessori of her position within the program. Male classmates tormented her and Italian law prohibited Montessori from working on cadavers within the presence of male counterparts (Shephard, 1996). Montessori spent countless hours and evenings alone in the dissection room, furthering her desire to continue her medical studies. Montessori's determination and uncharted career decision resulted in her graduating from the University of Rome Medical School and to become the first female medical doctor in Italy (McFarland & McFarland, 2011).

After graduation, Montessori won an appointment as Assistant Doctor at The University of Rome Psychiatric Clinic (Standing, 1957). During this time, one of Montessori's duties was to perform visits to institutions and select psychiatric patients to help further research. During these visits, Montessori became interested in the well-being of children who were mentally impaired (Lillard, 2005). Through her work in different psychiatric clinics and her involvement with children with learning differences, Montessori found her true calling. After witnessing mentally impaired adults and children in institutions, Montessori began to examine how a lack of stimulation harmed institutionalized persons (Lillard, 2005). Institutions were stark. Patients

remained in the same room for entire days. Walls and floors were concrete which did not provide any sensory stimulation. Feeding of patients was even less stimulating. It was expected that patients eat off the concrete floor with little to no assistance (Lillard, 2005). Not until Montessori visited an institution for children did she fully understand the need for stimulation and sensory input.

While visiting an institution for children, Montessori noticed that the children were very unhappy and huddled together almost like prisoners (Standing, 1957). Montessori spoke to the caregiver of the children and asked why her disposition was so hostile towards the children. The caregiver responded, “As soon as their meals are finished, they throw themselves on the floor to search for crumbs” (p. 28). As the caregiver gave Montessori an account of her caregiving duties and her role as a caregiver, Montessori looked around the dismal room and noted that the room lacked toys or any materials for children to interact with and use (Kramer, 1988). Montessori noticed the lack of sensory and stimulation items in the institution. Only after several more observations did Montessori conclude that the crumbs on the floor were the only sensory or stimulation the children received in the institute.

As Montessori continued her work as an assistant doctor, she shifted her focus to working with mentally challenged children. As Montessori gained more experience and knowledge through her interactions with children with learning differences, she realized that “mental deficiency was a pedagogical problem rather than a medical one” (Standing, 1957, p.28). This finding led Montessori to conclude that with special education opportunities, the quality of life for mentally challenged children could greatly improve (Standing, 1957).

To fully understand sensory input and stimulation, Montessori examined the work of Jean-Marc Itard and Eduard Seguin. Itard and Seguin created a “set of sensory stimuli for the

education of retarded [sic] children” (Lillard, 2005, p. 16). Once reviewing and understanding the different methods provided by Itard and Seguin, Montessori adopted the idea of sensory learning and began using stimulation with her patients (Brehony, 2000). Montessori created and named her sensory stimulation approach Sensory Materials, which became part of the Montessori terminology (Lillard, 2005). As a result of her research and creation of Sensory Material teaching and curricula practices that she concurrently created as she worked with patients, Montessori spoke at a conference regarding Moral Education (Standing, 1957). After the conference, Montessori accepted a position as director of The Orthophrenic School where she worked with special needs children (Standing, 1957). Montessori believed that “defective children were not extrasocial beings, but were entitled to the benefits of education as much—if not more than—normal ones” (Standing, 1957, p. 29). (Note: the word “defective” was appropriate for that time period in which Montessori was performing her research, however, current practices would acknowledge that referring to child as “defective” would not align with ethics and morals of best practices).

During her two-year leadership, Montessori worked with teachers and provided educational opportunities and training on how to work with mentally handicapped children. It was during these two years that Montessori truly became a teacher. Montessori worked tirelessly with children during the day and created notes, analyzed, reflected, and prepared new material in the evenings (Kramer, 1988). Montessori herself stated, “Those two years of practice are indeed my first and only true degree of pedagogy” (Standing, 1957, p. 29). In order to more fully understand human interactions and teaching practices, Montessori reenrolled at the University of Rome as a student to take courses in philosophy and psychology (Standing, 1957). During this time, Montessori continued to teach hygiene, anthropology, and education classes at the

university and to maintain a small private medical practice. In balancing these different roles, Montessori gained professional knowledge regarding educational practices and child development (McFarland & McFarland, 2011).

At the age of thirty-six, Montessori accepted an opportunity that would allow her to test her newly acquired educational knowledge while using her medical background. While working in child psychiatric wards, Montessori began to reflect upon children's "untapped hidden potential and speculated that all children would benefit from a new form of experimental education" (McFarland & McFarland, 2011, p. 22). Throughout Montessori's additional schooling and field work, she discovered that children have a strong inner potential. To cultivate a child's inner potential and desire to direct her own learning, Montessori affirmed that a child and a teacher must have a solid level of trust (McFarland & McFarland, 2011). Shephard (1996) further explains that Montessori's work allowed for teachers to observe children to more fully understand the needs of individual children. In addition to examining individual needs of children, Montessori believed that teachers should not give collective lessons, but rather guide under the idea of "auto-education" (Brehony, 2000, p.117). Auto-education further supports Montessori's teaching vision by providing teachers the opportunity to focus on individual children and their developmental needs versus the idea of collective, whole group lessons that might not be applicable to all children in the learning environment (Brehony, 2000). Montessori wanted to examine her reflective practice further.

During reflective practice, Montessori discovered that the behaviors exhibited by the children in the psychiatric wards were not medical or mental health problems but rather pedagogical and instructional issues (McFarland & McFarland, 2011). Furthermore, Montessori examined how a lack of meaningful interactions and activities affected the children living in

psychiatric wards (Kramer, 1988). This powerful realization allowed Montessori to develop her initial philosophy that guided her educational practices in the future. First, Montessori believed that children can best “manifest their authenticity and potentials when they are respected and have the opportunity to engage in stimulating physical environments as well as nurturing mental, emotional and spiritual environments” (McFarland & McFarland, 2011 p. 20). In addition to creating nurturing and encouraging learning environments, Montessori also examined how caregivers interact with children. Montessori concluded that caregivers need to change their perception of their role with children. Caregivers must change their perceptions of children “from one of lack and emptiness to one of potential and inherent dignity” (McFarland & McFarland, 2011, p.20). This perceptual change ignited Montessori’s idea that children need a “nurturing environment complete with experiential activities and satisfying relationships (McFarland & McFarland, 2011, p.20). In addition to a nurturing learning environment, Montessori expressed the need for caregivers to “plan for children daily” (Williams & Keith, 2000, p.218). Williams and Keith (2000) note that not only did the classroom need to support the individual needs of the children, but caregivers should be “rearranging and redesigning activities so that children have the very activity they need at the point they need it, without having to wait on others” (p.218). Furthermore, in order for caregivers to design classroom activities and learning experiences, caregivers should be cognizant of learning patterns and individual needs of the children (Williams & Keith, 2000).

As Montessori continued to build her understanding of children and the role of caregivers, Montessori maintained her role as a lecturer and professor at the University of Rome. During this time, Montessori held the position of chair of anthropology and her work *Pedagogical Anthropology* was published in a large volume format (Standing, 1957). In addition

to teaching and publication responsibilities, Montessori continued to examine the role of education and medical practices as she maintained her own private medical practice. During medical visits with patients, Montessori gained additional knowledge regarding the authenticity and potential of children, realizing that nurturing environments can awaken the soul and reignite their lives (Montessori, 1948/1991). After several years of balancing her multiple roles, Montessori closed her private medical practice, resigned as a university lecturer, and began to focus solely on education and educational practices (Standing, 1957). Montessori's new focus was to discover the authenticity of children and not simply through observation (McFarland & McFarland, 2011). Montessori stated:

It would be a great mistake to believe that, by merely observing children, we were led to form such a new idea as that of the existence of a hidden nature in the child, and that such an intuition gave rise to a special school and a special method of education. It is impossible to observe something that is not known; and it is not possible for anyone, all at once, by vague intuition to imagine that a child may have two natures (deviated and normal) and say, "Now I will try to prove it by experiment." Anything new must emerge, so to speak, by its own energies; it must spring forth and strike the mind evoked by what we call chance. (As quoted in Standing, 1957, p.35-36)

In order to truly understand educational practices within different learning environments, Montessori turned her attention to working with young children. She sought to understand the inner potential of children and to examine how basic trust would allow children to uncover their own authentic nature (McFarland & McFarland, 2011). The opportunity arose for Montessori to work directly with children; however, the conditions were not very desirable.

**Developing the Montessori Approach: Casa dei Bambini (Children's House)**

The San Lorenzo quarter, located in San Lorenzo, Rome, was described as a crime-ridden slum area that housed many dilapidated buildings (Kramer, 1988). During this time, the Rome Building Society, known as the *Institutio Romano Dei Beni Stabili*, began an “urban renewal” project and started to renovate and make basic improvement to the this area in the city (Standing, 1957). Even with renovations and improvements, this area still housed the poorest residents of Rome and was a picture of neglect by the city. However, the *Institutio Ramano Dei Beni Stabili* did construct two new buildings to entice younger families to move to the San Lorenzo quarter. San Lorenzo residents would see how the new residents maintained their new buildings and surrounding environment. The goal was to bring up the decency of living standards and to have one population of residents model appropriate lifestyle choices for the less fortunate population (McFarland & McFarland, 2011). With the new buildings came stricter residential standards. The building restrictions only allowed for employed married couples to reside in the building. However, this building restriction failed to understand one very important aspect of families residing in the two buildings: children (Kramer, 1988). It quickly became evident that while parents were at work, children had little to no supervision. Children were quickly creating disorder and destroying many of the newly renovated areas. Instead of making continuous repairs and repainting, the authorities decided it would be cheaper to build a location for and pay someone to supervise the children than to continually repair the damage done by unsupervised children (Standing, 1957).

With the establishment of a separate space for the neighborhood children, the Roman authorities needed to employ a person who could watch multiple children while understanding what would be in the best interest of the children. During the search for an appropriate

caregiver, a member of the search committee came across an article written about Dr. Montessori. After reading the article, the search committee asked Montessori if she would be willing to accept role of a daily caregiver to neighborhood children (Standing, 1957). Montessori quickly accepted the job, knowing that she would be able to use her medical and education background to support the needs of the children and satisfy her own desires to work with children in a classroom type setting (Kramer, 1988). In addition to gaining additional knowledge of child development and educational practices, Montessori liked the idea of working with parents as well (McFarland & McFarland, 2011). By creating a collaborative partnership with her educational practices and parental involvement, Montessori used best practices in her classroom.

While setting up the community classroom, Montessori had several budgetary constraints. The Building Society of Rome financed the building and had fiduciary control over building and classroom expenses. Montessori requested standard classroom furniture (desks and chairs) but her request was denied. In order to furnish the classroom through the budgetary confines of The Building Society of Rome, Montessori had small tables and chairs made as to not resemble classroom furniture (Standing, 1957). This classroom arrangement became the foundation of current Montessori classroom design. With restrictive financial backing and support, supplies and classroom material were very sparse. Montessori received some money from the society women to purchase toys and material but her resources were truly limited (McFarland & McFarland, 2011). At the time, Montessori created her own classroom material that mimicked the materials she used in the children's psychiatric ward. Montessori felt that if the materials used in the children's psychiatric ward promoted self-discovery and authentic learning, then similar materials would promote the same learning in her classroom (Standing,

1957). While constructing classroom materials and curricula that support varying abilities within a classroom, Montessori focused on creating a prepared learning environment that involved the use of “practical life and occupational materials, the sensorial materials, culturally based materials such as history, art, geography, and hand craft and materials for the development of spiritual and religious life” (Michel, 2002). Montessori believed that the classroom environment needed to provide an array of learning opportunities that allowed children to manage the routines and rituals of the classroom while working collectively and cooperatively (Michel, 2002).

With high hopes and expertise, Montessori was ready to embark on her new role. However, she faced many hurdles. First and foremost, the neighborhood was still run down and surrounded by slums. The conditions of the surrounding neighborhood did not promote the importance of education. Secondly, after years of little to no supervision during the day, many of the children were frightened at the idea of being supervised and confined to a classroom during the day. Montessori described the children as:

Sixty tearful, frightened children, so shy that it was impossible to get them to speak; their faces were expressionless, with bewildered eyes as though they have never seen anything in their lives...poor abandoned children who had grown up in dark tumble-down cottages without anything to stimulate their minds – dejected, uncared for. It was not necessary to be a doctor to see that they suffered from malnutrition, lack of fresh air and sunlight.

They were indeed closed flowers, but without the freshness of buds, souls concealed in a hermetic cell. (As quoted in Standing, 1957, p.37-38)

In order to supervise and care for all 60 children, ages three to six, Montessori hired a seamstress to help her in the classroom. Montessori knew the seamstress did not have any teaching credentials or teaching experience but that did not hinder the philosophy Montessori presented in

her classroom. Montessori commented, “I laid no restriction on the mistress, gave her no special duties; I merely taught her how to use the [instructional] apparatus so that she could present it accurately to the children” (Standing, 1957, p. 38). However, in order to gain further knowledge regarding child development and educational practice, Montessori took on the role of observer in the classroom (Lillard, 2005). While gathering copious observational notes, Montessori gained knowledge about the ability and skills needed for each age level.

On January 6, 1907, Montessori opened Casa dei Bambini (Children’s House) in San Lorenzo, Italy. Casa dei Bambini opened and operated within the physical structural confines and operational guidelines outlined by The Building Society of Rome (Standing, 1957). The classroom door opened, but the children were hesitant, filled with fright, and resisted the idea of being under the watchful eye of caregivers. In order to alleviate negative feelings within the newly opened school, Montessori respected each child and created a classroom environment that felt safe and nurturing. From her previous work in the children’s psychiatric ward, Montessori understood the importance of vocal tone when working with children who are weary of new environments or different adult interactions. Demanding obedience or using a harsh tone was not going to promote a safe and nurturing environment within Casa dei Bambini. Instead, Montessori attentively spoke to the children and patiently demonstrated simple hygiene and living skills to help each child feel more independent (McFarland & McFarland, 2011). Thanks to her gentle guidance and explanation of expectations, the disposition and behavior of the children drastically improved. Montessori believed that “children are capable of making responsible choices and that their choices reveal need” (Williams & Keith, 2000, p.218). Over the course of several weeks, Montessori noted that the more independent the children became, the more and more they strived for additional independence (Montessori, 1966/1972). Many of

the children who arrived on the first day at Casa dei Bambini as disobedient and disinterested soon became enthusiastic about learning additional life skills and working with the sensory materials Montessori presented in the classroom (Shephard, 1996). As the year progressed, Montessori noticed a drastic change in the children's appearance not only did the children look healthier, but their "self-confidence increased, and their behavior towards one another became cooperative rather than competitive" (McFarland & McFarland, 2011). Standing (1957) noted, "Montessori discovered that children possess different and higher qualities than those we usually attribute to them. It was as if a higher form of personality had been liberated, and a new child had come into being" (p.39). This outward and visible change solidified Montessori's notion that the inner soul of the child can flourish when given guidance and opportunity.

### **Solidifying the Montessori Philosophy and Approach**

Montessori believed in the power of observation. She viewed her classroom as a laboratory and her "experiment" was to truly understand how children learn (Lillard, 2005). Montessori also valued autonomy in the classroom and believed that children should have freedoms within their own learning (Murray, 2011). Murray also states that Montessori believed children should "have opportunities to exercise control over many aspects of their daily lives and learn to attribute success and failure to their own actions based on direct experience with consequences of their decisions" (2011, p.20). Through her observations, Montessori started to witness several patterns of learning that the children were inherently doing with limited adult guidance or adult intervention. Montessori noted that children in her classroom thrived with opportunities of concentration and repetition, love of order, open shelves and freedom of choice, the idea of completing work versus the idea of free play, no need for rewards or punishment, the joy of silence, freedom to move and learn in the learning environment, and lastly, freedom in the

classroom within certain limits that follow classroom expectations and discipline (McFarland & McFarland, 2011). In addition to classroom observations that fostered the development of classroom rituals and routines, Montessori believed that teacher involvement provided children and teachers the opportunity to work together to more fully understand varying learning processes (Williams & Keith, 2000). Through previous interactions with children and her own classroom observations, Montessori developed Eight Principles of Montessori Education – principles which correlate well with modern research in effective teaching and learning.

### **The Eight Principles of Montessori Education and Teaching and Learning Practices**

Through profuse classroom observations and her in-depth work with children who had varied learning abilities, Montessori started to notice how children connected to learning environments and materials presented within each setting. Classroom interactions and observations provided Montessori the momentum to develop guiding Montessori principles that support the overall vision of the Montessori Method. The guiding principles that were historically created by Montessori are still present in accredited Montessori learning communities and are noted in research as generally accepted beneficial practice. In what follows, I will outline these principles and modern uses to attest the value of each principle and connection to best practices.

#### **Principle 1: Movement Enhances Thinking and Learning**

Montessori was committed to the notion that physical movement supports cognitive development. Montessori advised that movement should be done in a purposeful manner and support cognitive milestones of the learner. Classrooms that follow the Montessori Method promote the idea that children should have freedom to move around the learning environment. Classroom arrangement should allow for movement and for children to have ample space to

accomplish their learning goals. Manipulatives such as wooden cylinders, wooden rods, or wooden prisms allow children to use their bodies to accomplish classroom tasks and learning objectives (Montessori, 1914). Montessori believed, “Cognition is embedded in action, by virtue of learning through these materials” (Lillard, 2005, p. 79). Within a Montessori classroom, children directly handle the materials that support their learning goals. Through direct interactions, children are able to use the materials to problem solve or move to more abstract thinking.

Modern research on teaching and learning also indicates that movement and cognitive development should be embedded into current classroom practices (Pellegrini & Bohn, 2005). Berk (1995) supports the idea of movement and its direct relation to cognitive growth (as cited in Jarrett et al., 1998). Morrison (2015) emphasizes the importance of hands-on learning and providing opportunities to children to be fully engaged in their own learning experiences. Through the use of movement and concrete materials, children can begin to understand experiences, concepts and learning processes (Morrison, 2015). Pellegrini and Bohn (2005) add cognitive breaks and movement can reduce cognitive interference (e.g., the inability to increase cognitive growth or progression due to cognitive fatigue) and increase learning and academic advances.

### **Principle 2: Well-being and Learning are Improved with a Sense of Control**

Montessori classrooms focus on personal choice and autonomy within the learning environment. Montessori believed that children should have an active voice in their own learning (Lillard, 1996). In order to support autonomy through learning, Montessori advocated that children need to understand their own inner voice which in return will allow for the child to have an active voice within the classroom. Furthermore, Montessori stated, “children make

choices in part of being in touch with postulated inner guides that direct them towards what they need, an interesting speculation ripe for empirical research” (Lillard, 2005, p.113). To further support the idea of autonomy and a sense of control, the selection of classroom materials is important. Providing children with the necessary classroom materials allows the child to select material based on his or her interest while still following the classroom expectations and curriculum guidelines (Lillard, 2005). Lillard argues “free choice was thus associated with both initial level of performance and with task persistence, which undoubtedly would lead to additional performance gains over time” (Lillard, 2005, p. 83).

Current research supports this first principle by stating when children are presented with opportunities that foster a sense of control, a sense of satisfaction and independence become pivotal in future learning (Berk, 2012). In order to build a sense of control through autonomy, Morrison (2015) suggests that teachers set up learning experiences that are developmentally appropriate and support the learning needs of the individual child. Lamb (2011) states that children need learning environments and teachers who are “autonomy supportive” and in order to reach that level of support, teachers need to create lessons and learning objectives that support individual learning needs (p. 71). In addition to individual learning goals and to promote student autonomy, tailoring of lessons and curriculum studies can aid students as they become more advanced in independent learning (Tai, Salder, & Maltese, 2007). Furthermore, when a child accomplishes a learning objective that promotes a sense of control within their own learning, such accomplishment will promote an additional willingness to further independence and a sense of control (Berk, 2012).

### **Principle 3: Interest in Information and Activities Promotes Learning**

Montessori education focuses on promoting a child's own interest by using the classroom environment and materials presented within the classroom. Lillard (2005) suggests that Montessori children are intrinsically motivated to learn due to the idea that learning environment and classroom material presents itself to support the individual interests and needs of the children. Extrinsic rewards can negatively influence a child's motivation. When a child is presented with learning opportunities that foster their interest, learning becomes more meaningful and optimized learning can occur (Lillard, 2005). Lamb (2007) elaborates by stating that when children have a sense of control over their learning objectives and goals through the development of autonomy, the skills learned in formal lessons can be applied to other areas of development and non-classroom activities.

Furthermore, Lee and Goh (2012) state when children are presented with authentic learning experiences (e.g. problem solving), they are able to apply creative thinking, problem solving, communication practices, and literacy skills to areas of interest and classroom work. Classroom teachers can support the individual interests of children through the use of integrated curricula through active learning and the use of individual instruction and that aligns with developmentally appropriate practices (Morrison, 2015). In addition to creating a supportive learning environment, Lee and Goh (2012) suggest that the teacher establish extensions of the classroom that support the interest of the children. Extensions include, but are not limited to public libraries, museums, community stores, and experts in a select field of study (Lillard, 1996; Lee & Goh, 2012).

#### **Principle 4: Extrinsic Rewards can Negatively Impact Learning Motivation**

Through observations and working with children in her first school, Montessori noted that children did not need extrinsic rewards to promote learning and when extrinsic rewards were

presented; extrinsic rewards may increase participation but only for a limited amount of time (Lillard, 2005). Lillard (1996) explains that children show a greater interest in their own personal learning goals when external factors such as extrinsic rewards are not integrated into the classroom. Montessori found that “extrinsic rewards not only decrease interest in an activity, they are also associated with less learning and creativity, with decline in prosocial behaviors, and changes in classroom environment and self-theories that leave many children unmotivated to learn in school” (Lillard, 2005).

To avoid the use of extrinsic rewards, Morrison (2015) suggests teachers focus on the idea of using process praise over personal praise. Process praise, as defined by Morrison (2015) is praising the child on his effort over who the child is as a whole person. Process praise allows the child to build a solid foundation and understanding of the work he is working on rather than self-worth that can be perceived through personal praise. The use of encouragement can also eliminate the need for extrinsic rewards. A more successful approach to alleviate the need for extrinsic rewards is for the teacher to examine how children interact with the learning environment (Pressick-Kilborn, Sainsbury & Walker, 2005). Through exploring how children connect with authentic learning environments and the curriculum, teachers can develop curriculum enrichments that support intrinsic motivation factors that children exhibit in the classroom setting. When a teacher fully understands a child’s inner motivation, learning objectives and goals can become richer. Through this awareness, the use of process praise can enhance a child’s understanding and promote a true sense of inner drive (Pressick-Kilborn et al. (2005) and more process orientated.

**Principle 5: Collaborative Arrangements and Settings Facilitate Learning**

Montessori classrooms are designed to provide children with learning experiences and opportunities that support a collaborative learning environment. The manner in which each classroom is arranged, the selection of furniture, the use of classroom materials should promote peer interaction (Lillard, 2005). In addition to room arrangement and materials, Montessori believed that mixed-age classrooms fostered peer relations and encouraged student modeling. Collaborative environments have been shown to promote social interactions and a sense of classroom community. Furthermore, mixed-age classrooms allow children to “observe and emulate models of activities more advanced than their own; and receive emotional support and care beyond that which age-mates could provide” (Gray, 2011, p.504). Research states that when children have the opportunity to work in a mixed-age learning community, older children scaffold learning behavior for younger children which align with Vygotsky’s theory of zone of proximal development (Corso, 2007; Gray, 2011; Morrison, 2015). Children do not have to be directly involved in the learning activity to have their own ability stretched to a higher level. Increasing ability can occur through observation and listening to older classmates (Gray, 2011). To foster emotional support within a mixed-age classroom setting, Corso (2007) states that children need to be taught about friendships skills, how to emotionally regulate, demonstrate empathy, and problem solve. In order to enhance emotional support within a classroom, strategies such as “describing, modeling, rehearsing, role-playing, prompting children in a naturalistic context, and reinforcing and acknowledging the skill when it occurs” will allow children to progress in their own emotional development and emotional interactions with peers (Corso, 2007, p. 53).

Copple and Bredekamp (2009), leading early childhood education researchers in developmentally appropriate practices, support the idea that children learn best in a collaborative

setting through the promotion of “prosocial behavior and attitudes” (p. 197). Prosocial behaviors allow children to work cooperatively, problem solve, and create a classroom community that is responsive to everyone’s needs (Copple & Bredekamp, 2009). Wittmer, Petersen, and Puckett (2013) state when children exhibit prosocial behaviors the classroom environment can become a more collaborative unit and promote further learning. When children observe and interact with others that exhibit prosocial behaviors, children may begin to understand when they perform a good intention, their behavior does not have to be rewarded (Wittmer, Petersen, & Puckett, 2013). Subsequently, it is important to create a classroom environment that promotes a collaborative learning environment. In doing so, there is a likelihood that children will engage in “meaningful ways if the materials and activities are designed and selected based on children’s unique interest, ability level, and background” (Corso, 2007, p.52-53)

#### **Principle 6: Meaningful Context Provides Deeper, Richer Learning Experiences**

Meaningful context is a motivating factor that may allow children to examine interests through more complex thinking (Lillard, 2005). When learning occurs in an authentic setting, children are “motivated to engage with the activity because it is perceived to be personally meaningful, relevant, and significant” (Pressick-Kilborn, Sainsbury & Walker, 2005, p.30). Acquisition of new knowledge provides children with the opportunity to expand prior knowledge and more fully comprehend concepts and skills that they initially examined. Lillard (2005) states that meaningful context gives knowledge meaning, allows knowledge to become more clear, provides a way for children to share with others, and promotes the idea of cross-curricular and home to school transfer. Offering children the opportunity to connect with the context of the classroom can support future learning and allow for current learning to have more meaning and significance. Brooks and Young (2011) state when creating learning environments that allow for

more discovery and diverse application, it is best to understand each child's learning and management style to ensure the child is able to take advantage of the learning opportunities presented within the classroom setting.

Copple and Bredekamp (2009) suggest that learning experiences need to be developmentally appropriate while supporting the cognitive, social, emotional, and physical needs of the child. Classroom environment and selected materials should provide children with a meaningful way to connect to the curriculum and the learning expectations established within the school setting (Morrison, 2015). In addition to creating richer classroom environments and deeper curriculum connections, fostering personal connections to meaningful context allow children to develop personal meaning within their own learning. Meaningful context allows for on-going reflection which can be applicable to broader learning experiences (Pressick-Kilborn et al., 2005). Subsequently, Corso (2007) states that when children are able to fully engage in activities that are meaningful and enjoyable, classroom misbehavior has a tendency to decrease.

### **Principle 7: Optimal Child Outcomes are Associated with Adult Interactions**

Montessori believed the role of the teacher was to demonstrate warmth, sensitivity, and to have high standards for expected behavior within the classroom (Lillard, 2005). Montessori's view on teacher interaction closely aligned with the work of many psychologists who value secure attachments with caregivers, authoritative parenting, and self-managing theories (Lillard, 2005). Montessori advised teachers to form strong attachments to the children by working with children closely in lessons and classroom interactions. In creating strong relationships with a child, teachers can have a deeper understanding of the child and his individual learning needs. Aside from learning needs, interactions that build relationships allow individuals to "better

understand the barriers between ourselves and others, and the ways in which our expectations color our interactions with others” (McGaha, Cummings, Lippard, & Dallas, 2011, para.46).

Berk (2012) suggests that when an adult provides a warm, sustainable relationship overtime, children typically exhibit higher levels of confidence, have a better understanding of their own self-concept, are able to demonstrate emotional stability, form stronger relationships with peers and teachers, have more effective social skills, display a moral responsibility, and have higher motivation in a learning setting. Creating nurturing relationships that truly support the development of children is built over time through “respectful, reciprocal, and responsive responses” (Corso, 2007, p. 52). In order to have respectful relationships, the teacher and the child must understand that each person has a different perspective or “voice” and each “voice” has a position within the classroom but should not negatively impact others (Lamb, 2011). Reciprocal and responsive interactions are crucial when building relationships with children. Evaluating dynamics between a teacher and a child can be a catalyst for reflective practice and transformation which can strengthen the relationship (Lee & Recchia, 2008).

### **Principle 8: Order within a Learning Environment is Beneficial to the Child**

Montessori believed that the classroom design and organization should support the learning choices of the child. The classroom layout should be arranged and organized in a manner that supports the varied levels of learning that each child exhibits within the classroom. To further that idea, that classroom materials should be organized in “logical progression that is coherent and internally consistent” to the periods of cognitive development (Lillard, 2005, p. 324). In addition to classroom organization and layout, Montessori believed that solid classroom organization supported the idea that children use the material to construct their own knowledge (Lillard, 2005). In order to support the need for autonomy within the classroom, examining the

role of the teacher is important. To align with the Montessori's philosophy, Bunnag (2000) states, the teacher should be viewed as a facilitator that focuses on the child's progress over an instructor that emphasizes on a finished work product.

Teachers provide a significant role in establishing the classroom organization, layout, and the overall climate of the classroom (Morrison, 2015). Classroom design and order can be directly related to a child's behavior (Corso, 2007). Establishing a supportive and shared classroom environment can promote a more democratic setting where each child can feel valued and be an active member in the learning community (Morrison, 2015). In addition to the classroom atmosphere, recognition of the classroom layout and the organization of shared materials should support the learning needs of the children through varied learning formats, an array of manipulatives, different progression and assessment practices, and a reciprocal teacher-child relationship (Berk, 2012).

### **A Classroom Portrait: Unfolding the Guiding Principles**

In maintaining her teaching role within classroom, Montessori noticed several other critical components that support the Eight Guiding Principles of Montessori Education. In addition to creating a learning environment that supports progress learning over product learning, Montessori discovered another layer of learning. These additional elements included: concentration and repetition, arrangement and order of physical objects, freedom of choice, rewards and punishments, the use of periods of silence, physical movement and sensory learning, classroom freedoms within boundaries and lastly, personality temperaments and behavior. In addition to the guiding principles being evident in current Montessori classroom practices, the additional elements that Montessori discovered can be witnessed in Montessori classrooms that follow the guiding principles.

During one of Montessori's observations, she best described concentration and repetition through an activity she witnessed with a young girl. The child was attentively working with wooden cylinders while trying to match each cylinder to a corresponding wooden socket (Standing, 1957). The girl worked with such precision and pinpoint concentration that the other activities going on concurrently in the classroom had no effect on the girl's level of concentration. Montessori astutely watched the child as she "isolated herself mentally from the rest of her environment" and continued to work on matching the cylinders to the correct wooden socket (Standing, 1957, p.40). Montessori then became interested in figuring out what disrupts or "breaks" the child's level of concentration. In order to test this thought process, Montessori asked the classroom teacher to have the other children in the class sing aloud and walk around the child. As the level of noise and activity increased in the classroom, the girl's level of concentration remained steady. Montessori wanted to continue to test the girl's level of concentration, so she picked up the chair the young child was sitting in and moved the chair, with the child in it, and placed the chair on a table (Standing, 1957). The girl's level of concentration remained strong and she continued to work with the cylinders and sockets.

While examining the child's level of concentration, Montessori also noticed that the girl performed the activity over and over. Montessori began to observe the use of repetition with young children and concluded that repetition, while it may seem meaningless to adults, truly fosters processing in children and helps them acquire the foundations of different learning (Standing, 1957). In witnessing this degree of concentration and repetition, Montessori was worried about mental fatigue. However, once the child completed the activity, Montessori noted that she was refreshed rather than fatigued (Standing, 1957). Montessori attributed this mental

alertness to the idea that the child was at liberty to work with material that she had interest in, so the activity was stimulating and not mind numbing (Standing, 1957).

Witnessing this activity allowed Montessori to discover that children have a boundless ability to focus their energy, attention and repetitive desire to perform a task over and over again until they have inner satisfaction or have mastered the activity they are performing (Schmidt, 2009). Montessori also noted that concentration and repetition may promote the feeling of connection to authentic learning and provided peace, a sense of inner calm, and authentic learning with young children (Lillard, 2011).

In addition to concentration and repetition, Montessori recognized that children ages one through six progressed through a sensitive period that focused on physical order of objects (Helfrich, 2011). In order for young children to build schemas and a sense of order in their learning, Montessori believed that tangible objects need to be orderly to promote mental organization (McFarland & McFarland, 2011). Montessori understood that physical order and mental organization were not inherent with young children, but as the children in the classroom manipulated classroom materials and progressed through classroom activities, Montessori noticed that children created order with physical materials and increased their own strategies for mental organization (Standing, 1957).

Montessori also realized that when the children completed their work with classroom material, they wanted to put the material back where it belonged in the classroom. This realization came only after the classroom teacher would put up the classroom material and the children would follow her to see where she placed the material. Once Montessori noticed this pattern, she determined it was best to let the children return the classroom material to where it belonged. When Montessori allowed the children to work through this process, they were able to

start a task from the beginning, retrieving the material they wanted to work with, through the end of the process, returning the material to the appropriate storage location (Schmidt, 2009).

Montessori connected this thought process back to the idea of young children working through different levels of sensitivity (Standing, 1957). Not only were young children able to create order in their learning, but also they were able to create order in their own learning environment. Montessori noticed a vast difference in terms of environmental order and a child's age. Younger children tend to create environmental order with the material they are working with, where older children tend to let this skill become more lax as they mature (Standing, 1957). Montessori quickly realized that the younger children were more adept at helping create order in the classroom but the older children had to be taught and redirected by the adults in the classroom on how to create order within the learning environment (Eissler, 2009).

In order to understand how children use the idea of freedom of choice, Montessori explained how one day the classroom teacher arrived late to the classroom. On the same day, the classroom was expecting visitors and the classroom material and activities had not been set up in the classroom (Standing, 1957). After the children realized that the teacher was running late and the classroom was not set up, the children opened up the classroom cabinets and took out activities and materials and started on their lessons (Standing, 1957). When the teacher arrived, she was angry at the children for entering into the cabinets and removing material. Montessori described how the teacher wanted to punish the children, but Montessori viewed this situation differently. Montessori saw this opportunity as a way to demonstrate how, with internal motivation and the proper understanding of material, children have the innate ability to choose work that interests them and their personal needs (Kramer, 1988). With this realization, Montessori established the notion of "free choice of activity" and instead of having all of the

materials secured in a locked cabinet, she replaced the large, locked material cabinet with low shelves easily accessible to the children (Standing, 1957). This idea further supports the notion of independent learning and cultivating inner satisfaction through meaningful work (McFarland & McFarland, 2011).

The use of rewards and punishments to manage classroom behavior was not effective as a classroom management strategy; Montessori quickly observed that when the classroom teacher praised or punished a child, the reward or punishment did not truly affect the child's behavior (McFarland & McFarland, 2011). Montessori noticed that when the children were fully engaged in an activity, their own inner discipline would regulate their impulses and helped them avoid punishments (Lillard, 2005). The promotion of inner discipline greatly reduced the desire to misbehave (Schmidt, 2009). In younger children, the greatest reward is the ability to work with more advanced classroom material or on a lesson that is equally appealing. Good behavior allows the child to take advantage of his inner drive and work from a state of authenticity (Eissler, 2009).

Montessori discovered the need for periods of silence during learning by accident. Montessori brought a sleeping infant into the classroom and had the children observe him (McFarland & McFarland, 2011). When describing the sleeping child, Montessori asked the other children if they thought they could be as silent and still as the baby. All of the children in the classroom sat in complete stillness and silence. This experience taught Montessori that periods of silence during learning allow children to connect to their inner self and regulate their actions (McFarland & McFarland, 2011).

From her work in psychiatric wards and as a medical doctor, Montessori understood the importance of movement in the learning process. Through her observations and working with

children as they progressed in their lessons, she discovered that children could remember more when teachers allowed them to physically move during the lesson or activity (Montessori, 1917/1965). Montessori understood how the five senses supported learning. In creating lessons and activities, Montessori embedded actions and skills that enhanced movement and the five senses (Helfrich, 2011). Not only did Montessori embed movement and the five senses in lessons, but she also designed the classroom to support the physical and sensory needs of the children. Low placement of classroom shelves gave children access to the classroom materials without adult support, classroom furniture fit the needs of smaller bodies, design of classroom materials fit the needs of the children and ease of use, moveable materials allowed children to work around the classroom, and lastly, Montessori added plants and animals to the classroom so the children could engage in nature and learn caretaker responsibilities (McFarland & McFarland, 2011).

As the children progressed in the classroom with materials and activities, Montessori noticed that many of the children excelled with freedom within boundaries in terms of their scope and sequence of learning. People often confuse this freedom with the idea that Montessori classrooms are chaotic and have no limits. By contrast, Montessori did not approve of a chaotic classroom but she understood the value of well-defined freedoms within the classroom (Lillard, 1996). Montessori promoted the idea that children should be able to freely move around the classroom, select their work and stay with it as long as they had interest in it (McFarland & McFarland, 2011). If this freedom distracted a child, Montessori promoted the idea of redirection and would ask the child to re-engage with a new lesson or activity. The use of adult re-direction was limited and used if the child needed assistance in selecting meaningful work (Montessori, 2008). In selecting meaningful work through well-defined freedom, Montessori

promoted the idea that the tendency for deviant behavior diminished and children could truly promote their authentic selves (Kramer, 1988).

To further develop the learning practices and classroom management techniques that Montessori witnessed in the classroom, she noticed that the children who arrived to the classroom as unruly and with unhappy dispositions became fully engaged in their own learning and had great improvements in their mindset and temperament (Standing, 1957). Not only did Montessori notice a shift in each child's temperament, but also she observed that the children were treating their peers better. Montessori attributed this shift as "spontaneous self-discipline" that was truly coming from within and when one has serenity of one's own spirit, one has great respect for others (Standing, 1957, p. 50). As the children became more comfortable in the classroom and with the materials provided, the movement in the classroom was harmonious and fluid. The children selected their own work for the day, retrieved needed materials, and restored the classroom to the teacher's expectation (Montessori, 2008). Montessori promoted this period of growth and soon concluded

Everything about them betokened a heightened interest in life, and with it a new form of dignity. They looked – as indeed they had become – independent personalities with power to choose and to carry out their own acts. They did not abuse this liberty which had been granted them. Rather this liberty was the very means through which they were able to reveal this new self-discipline. (Standing, 1957, p. 51)

This newfound self-discipline bewildered the classroom teacher. The drastic shift in the behavior and willingness to learn of the children provided an opportunity of growth for the classroom teacher (Standing, 1957). No longer was the classroom subject to rules and behavior

management strategies but rather it was being run by the love of learning and supporting curious minds.

### **Sensitive Periods of Growth in Children**

In addition to developing The Eight Guiding Principles of Montessori Education and noting the supporting elements of Montessori education, Montessori examined different developmental growth patterns in young children. Montessori's work in healthcare provided her with medical knowledge regarding the different stages of development while her work in education allowed her to make developmental connections to witnessed accounts within the classroom. It was through her varied experiences in both the medical and education profession that Montessori developed the idea of sensitive periods of development. Sensitive periods of growth include: repetition for inner satisfaction and mastery of skills, presentation of the classroom and materials, acquisition of language, order and precision within the environment, the use of schedules and routines, sensory learning, and the ability to connect with a larger setting.

In order to understand the idea of sensitive periods of development, Montessori examined the work of Hugo de Vries, a Dutch horticulturist best known for fully developing the idea of Mendelian inheritance (Lillard, 2005). To support the findings of Hugo de Vries's work, developmental scientists argue that sensitive periods are times when an organism develops in a certain way, given certain environmental factors (Lillard, 2005). Montessori took Hugo de Vries's concepts and applied them to human development. In many cases, Hugo de Vries's theory was applied by scientists to animal life, but Montessori saw the value in applying the notion of sensitive periods of development to young children. Montessori further developed Hugo de Vries's definition to fit the needs of her work. As Montessori stated, periods of

sensitivity are related to certain elements in the environment toward which the organism is directed with an irresistible impulse and a well-defined activity. These periods are “transitory; and serve the purpose of helping the organism to acquire certain functions, or determined characteristics” (Standing, 1957, p. 119).

When applying the idea of sensitive periods of growth to children, Montessori further explains that as children work through sensitive periods of growth they “reveal an intense and extraordinary interest in certain objects and exercises (Standing, 1957, p. 120). In addition to precise focus and attention, children tend to become disinterested in other areas of their environment. This unbalance is not a developmental defect but rather a way for the child to solely focus on the skill or ability that requires attention. When children are at the height of a sensitive period, their curiosity and drive come from within their mind (Montessori, 1917/1965). Morrison (2015) furthers this idea by stating, “children need not just any experiences but rather the right experiences at the right times” (p. 242). What once might have been chaotic and disconnected in the sense of learning now has order and purpose.

During sensitive periods, Montessori observed that children use repetition until they have inner satisfaction or mastery of a skill (McFarland & McFarland, 2011). In addition to self-gratification or proficiency of a skill, Montessori believed sensitive periods or critical periods allow for children to be more “susceptible to learning certain behaviors and can learn specific skills more easily” (Morrison, 2015, p. 161).

While Montessori observed children working repetitively on a specific skill, she also watched how adults interacted with the children during repetitive practices. Montessori argued that adults need to have an awareness of when children are advancing in sensitive periods and allow the children to have full concentration and focus on the task at hand (Helfrich, 2011). The

teacher is critical when children are advancing through sensitive periods, as “one role of the teacher is to use observations to detect times of sensitivity and provide a prepared setting that supports optimum learning” (Morrison, 2015, p. 161). Additionally, Montessori states,

If the child is prevented from enjoying these experiences at the very time when nature has planned for him to do so, the special sensitivity which draws him to them will vanish, with a disturbing effect on his development, and consequently on his maturation (Montessori, 1988, p. 87).

Montessori’s understanding of children’s need to enter and remain in sensitive periods led her to develop classroom practices and activities to support the varied degrees of learning within her classroom.

In addition to her already astute classroom observations, Montessori noticed the presentation of classroom material supported sensitive periods of development. Montessori noted how children navigate language acquisition, the use of small objects to support learning, the need for order and precision in their learning environment, the idea of gaining additional environmental knowledge through exploring oral and touch senses, the element of movement and its true connection to acquiring new skills, the deep rooted need for social interactions with peers and adults, and lastly the sense of interconnectedness to an immediate environment and a larger universe (McFarland & McFarland, 2011).

Montessori examined language acquisition and determined that during the sensitive period of language development, psychological and physical developments occur within each child. At birth, children do not have the ability to speak, but by the age of two most children can formulate verbal knowledge and speak in their native language (Wittmer, Petersen, Puckett, 2013). This vast degree of development occurs through inner motivation, the advancement of

the subconscious mind, sensory awareness, and lastly the physical growth of vocal cords (McFarland & McFarland, 2011). As Montessori explains,

When a child is born the sounds in its environment form a confusion, a jumble, a chaos. Then suddenly this mysterious urge begins in the soul, this inner flame of interest is lit up, and is turned outward as a light upon this dark exterior confusion. Under its influence sounds separate themselves, though as yet language is not understood. Nonetheless these sounds have become distinct, fascinating, alluring. The child's mind now listening voluntary to the spoken language; which becomes as a kind of music that fills the soul. (Standing, 1957, p. 122-123)

Thanks to her understanding of language acquisition, Montessori developed classroom practices and activities that reinforce the differing acquisition periods of the children in her class.

Learning how to manage an unfamiliar environment or chaos through order and precision within a sensitive period of growth can allow a child to interact within unfamiliar environments and learn how to gain a sense of calm (McFarland & McFarland, 2011). Not only is a well-organized environment more manageable and easier to navigate, but order and precision allow the child to witness and experience inner contractiveness and schemas for building additional knowledge. Montessori explains that the use of routines and schedules allow young children in particular to display a need that everything has a familiar place and daily events take place routinely and within similar time periods (Montessori, 2008).

Montessori quickly noticed that schedules and routines were vital in sensitive periods of development. The love that adults feel for order within their environment is a different kind of love than that young children gain from order and routine. Adults use order and routines for comfort and to aid efficiency practices; however, young children need order, routines, and

stability because they use elements within their environment to aid in their own development (Schmidt, 2009). Children must have a strong foundation of order and routine to further build their knowledge and skills within their own environment. In contrast, if a young child lives in a consistently chaotic environment and does not have a strong foundation of order and routine, a constant sense of bewilderment can occur that can hinder developmental growth (Morrison, 2015).

The use of senses is very important to cognitive and physical sensitive periods of growth. Stimulating the senses of taste and touch is highly regarded in the Montessori classroom (Standing, 1957). When presenting young children with new materials, they use the senses of taste and touch to explore the new material. Not only do they begin to examine the new material, but they also refine prior knowledge with their senses through the use of materials (Helfrich, 2011). To develop this idea further, Montessori made the connection that sensory learning directly connected to neurological structures and had an effect on a child's cognitive growth and intelligence (McFarland & McFarland, 2011). Montessori developed classroom materials and activities that encouraged the use of sensory learning. In developing strong senses through learning, Montessori promoted the idea that children who learned through their senses would have very keen senses as adults (Standing, 1957).

To support the notion of sensory learning, Montessori also examined the sensitive period of movement. From birth, children are immobile but quickly muscle tone and physical strength and development occurs. To support sensory learning, Montessori closely relates the notion of movement and its importance in the child's learning environment (Montessori, 1995). By using their senses in conjunction with movement, children connect the body and mind and can use the information received to support or even change their learning environment (Lillard, 2011).

Fostering and nurturing relationships between adults and children during sensitive periods of growth, help children feel a true sense of belonging within an environment.

Montessori examined how the children in her classroom developed relationships and she noticed that relationships went beyond the general idea of attachment. The younger children in her classroom demonstrated attachment relationships while the older children had a deep interest in understanding relationships with others (McFarland & McFarland, 2011). Not only did the older children desire to have a true understanding of relationships, but they demonstrated the need to comprehend how to work together in a fair, cooperative manner that supported the overall learning community (Lillard, 1996).

To nurture older children and their progression through sensitive periods of growth, Montessori noticed that most had a yearning to examine how the classroom connects to a greater world. This period of development allows children to understand how their interactions and behaviors directly impact a larger community. Understanding the interconnections between the classroom and the community allows children to see how differing environments work amongst each other through different elements such as others, plants, animals, and other communities (Helfrich, 2011).

Montessori discussed the need for adults to recognize when children are entering and progressing through sensitive periods of development. Montessori argues that caregivers need to have an understanding of developmental periods and how certain periods connect to social, emotional, cognitive, and physical developmental milestones (Montessori, 1995). To more fully understand sensitive periods and developmental milestones, Montessori believed that caregivers who tend to children need to have lessons or skill extension activities to support desired learning outcomes (Standing, 1957). Montessori promoted the idea that caregivers need to present to

children skills and tasks at the appropriate age and developmental stage. Children can learn advanced skills and tasks if they have mastered previous skills that relate the current task that is in focus (Berk, 2012).

For Montessori, connecting educational practices and activities to the sensitive periods of development (e.g., repetition for inner satisfaction and mastery of skills, presentation of the classroom and materials, acquisition of language, order and precision within the environment, the use of schedules and routines, sensory learning, and the ability to connect with a larger setting), would allow children not only to gain a sense of self but also to foster the strong desire to work with eagerness and enthusiasm (Morrison, 2015). Montessori said that when children had a true sense of self and their surrounding environment, their desire, ability, and concentration level to work through multi-step tasks was done with willingness and the desire to accomplish the task (Standing, 1957). Montessori added that if children have the internal desire and eagerness to perform their studies and work duties, then the desire to accomplish tasks to a satisfactory or mastery level increased greatly (Montessori, 1995). When a child has the desire to accomplish an academic or a life skill, within a supportive learning environment, the child has focus and motivation to work fully through the learning process to meet the needs of his or her desires (Lillard, 2011). To support the overall process of learning and meeting the needs of the individual learner, Cossentino states, “the progressive effects of joyful work, freely chosen, are meant to lead to a particular vision of “goodness”. And that vision not only links virtue to concentration, discipline, and order but also links to human development to social progress” (p. 69).

### **The Logistics of Modern Montessori Education**

Throughout years of observations and working with children in her classroom, Montessori made adjustments and improvements to her classroom practices and layout to better support the needs of the children in the classroom. Montessori classrooms include: (1) multi-age student grouping, (2) the use of distinct learning areas through the use of small shelving, (3) classroom materials have a specific function to support development, (4) the use of classroom storage, (5) hands-on classroom material that supports sensory learning, (6) the use of large block of uninterrupted work time, and (7) the overall role of the teacher as a classroom facilitator and not a classroom director.

**Multi-age Classrooms.** During the early years of implementation practices, Montessori had limited resources which lead to the decision to use multi-age grouping. Traditional Montessori classrooms have three-year age grouping learning within the same classroom. If a traditional Montessori school cannot support three-year age grouping due to enrollment size, it would be appropriate and not uncommon to find to all six years of elementary aged children working together (Lillard, 2005).

**Distinct Learning Areas.** Typical classroom arrangement in a Montessori classroom is visible by the distinct learning areas. Each area is defined by small shelving units. Storage of “materials” or educational manipulatives are contained within the shelving units (Lillard, 2005). Montessori also developed the notion of a “prepared environment” (Morrison, 2015, p.161). Montessori believed that a prepared environment is a learning environment where children can perform tasks by themselves (Morrison, 2015). To attract children to materials, the use of wooden and natural tone manipulatives can be found within classrooms (Lillard, 1996). Initially, the classroom materials that were used in early Montessori classrooms had a primary focus and

are used during process learning and to demonstrate proficiency. However, as concepts and lessons have evolved, many of the materials in today's Montessori classrooms have a secondary purpose that supports academic concepts (Lillard, 1996). Teachers can perform classroom assessments as a child uses the materials within a lesson. When a child uses the material correctly and is able to exhibit mastery of a concept or skill, teachers are able to witness from the child a level of satisfaction (Lillard, 2005). When children used the material correctly, Montessori was able to examine how classroom materials supported a child's inner motivation and drive to complete specific tasks (Murray, 2011). In order to correct improper use of materials for a specific lesson, classroom teachers demonstrate and repeat lessons to ensure proper use of the materials is understood by the children and how such materials support classroom lessons. Teachers may also use the classroom materials to build extension activities that support the needs of the children (Lillard, 1996).

**Classroom Materials.** All of the materials in a Montessori classroom have a specific function. Individual or small group lessons performed by the teacher demonstrate how to use classroom materials and achieve desired outcomes with specific materials (Lillard, 2005). Shephard (1996) described an example of how Maria Montessori designed classroom material to have a specific function within the classroom. Shephard (1996) continued by stating that Montessori presented a three-year old girl with ten, pink blocks that ranged in size. Montessori demonstrated to the child through slow movements on how to build a tower using the ten different blocks. After Montessori finished her demonstration, Montessori allowed the child to manipulate the blocks and mimic the construction of a tower. The child had difficulty grasping the larger blocks with one hand and exhibited frustration. Soon after, the child used both hands and was able to begin the process of building a tower. Once proficient in stacking the blocks, the

child repeated the process over and over. As Montessori observed the small child she noticed that the child was exhibiting self-control and independence. The use of material in a structured manner aligns with Montessori's planned and well organized curricula (Lillard, 2005). Materials provided in a "prepared environment should provide three basic areas of child development which include: (1) practical life or motor education, (2) sensory materials for training the senses, and (3) academic materials for teaching writing, reading, and mathematics" (Morrison, 2015, p.161). Organization of curricular concepts and materials are set in a hierarchical sequence that supports age and developmental appropriateness. Once the foundation of the curriculum and materials is set, the lessons and the overall curriculum become interrelated through the use of materials and concepts (Schmidt, 2009). The use of materials also allows children to work towards more complex skills. Initially, a child may use the materials to work through a simplistic skill, once the child masters the initial skill, the child may use the same material to solve a more challenging task (Lillard, 2005). The idea that one skill will support the use of another skill is paramount in the Montessori Method (Murray, 2011).

Invention, selection and use of classroom materials is done with a purpose. Creating and selecting materials that support varied learning abilities allowed Montessori to see patterns of growth within the children and provided feedback on how the materials connected the idea of hands-on learning with cognitive, social, emotional, and physical growth among the children (Michel, 2002). Montessori noted that when she walked into a classroom, when children were fully engaged with the classroom materials she knew that authentic learning was occurring which brought her joy (Standing, 1957). To further the idea of authentic learning, current Montessori practices look beyond the classroom and the materials presented in the classroom to foster cognitive, social, emotional, and physical growth. To augment the Montessori curriculum, many

schools use field trips, experts from the community, and advanced hands-on experiences to support the Montessori Method (Rathunde & Csikszentmihalyi, 2005). In addition to extending the classroom into the community, many Montessori schools are looking beyond the elementary school level and focusing on the developmental needs of middle school children. Current research indicates that middle school children want to demonstrate autonomy in learning through additional choices within the curriculum (Rathunde & Csikszentmihalyi, 2005). Providing middle school age children autonomy and curriculum choices supports metacognition, which allows for more cognitive integration (Rathunde & Csikszentmihalyi, 2005). This notion aligns with traditional Montessori philosophy and allows for the creation of authentic learning environment.

**Storage and Organization.** Another difference between a Montessori classroom and a traditional classroom is the use of storage. Montessori classrooms can look stark and pristine, with many teachers noting that it does not look warm and inviting (Lillard, 2005). Storage and rotation of classroom materials is determined and performed by the classroom teacher to best support the needs of the children. When children have worked through a lesson with specific material that supports that lesson, the materials are then put into storage and the presentation of new materials is done by the teacher to support the learning needs of the children (Lillard, 2005). If a child has completed his work for the day, but the material is not ready to be stored, the child is expected to return the material he was working with to the appropriate shelf or area within the classroom (Montessori, 2008). Not only does this action allow other children to use the material but it also promotes the idea that order allows the classroom to run smoothly and gives everyone the opportunity to work with the classroom material. This attention to detail demonstrates respect to peers and the learning environment (Lillard, 1996). The idea of rotating classroom

material allows the children to use the material to directly support the lessons they are currently working on. In addition to direct connections to curriculum objectives, the use of rotating classroom materials allows for the classroom teacher to assess the needs of individual students as he or she works through lessons with the presentation of new material. Children working through lessons at their own pace versus standards and timelines created by school administrators or teachers allows children and teachers to fully comprehend lessons and demonstrate mastery of content or a specific learning goal (Murray, 2011).

**Hands-on, Sensory Learning.** Hands-on material also promotes Montessori's notion of sensory learning through developmental milestones. Montessori was joyful that learning through the senses was occurring in the classroom and soon realized that the initial hands-on work that the children performed led to deeper levels of learning and provided an additional layer of motivation for children to extend their learning even further (Standing, 1957). The underlying idea of motivation and competence is seen as children work through varied lessons in the classroom. Montessori education builds on the notion that competence fosters competence, which in turn encourages children to increase their skill and perform greater intellectual challenges within the classroom (Shephard, 1996). Not only does the classroom material provide for competence, but it also allows for autonomy. Autonomy is a pillar of Montessori education and provides children freedom within limits (Murray, 2011). When a teacher creates classroom materials and lessons that support competence and autonomy, children have a sense of control and ownership in their own educational process. This embedded ownership allows children to set appropriate educational goals which are also a key element in the Montessori Method (Lillard, 1996).

**Blocks of Uninterrupted Work Time.** The use of three-hour blocks of uninterrupted work time allows children to fully engage with the classroom materials and lessons they are working through (Schmidt, 2009). Children do not have assigned seats within the classroom but rather they are free to move around the classroom and work with peers (Rodriguez, Irby, Lara-Alecio, & Brown, 2013). The children are free to select materials and lessons that support their learning objectives and goals (Lillard, 1996). More specifically, one learning objective might be to have children learn about the research process. In order to support autonomy in learning, the classroom teacher might give an individual or even a small group lesson explaining the process and then allow each child to select a topic and if desired, research companions to support his or her own individual learning process (Murray, 2011). In a Montessori setting, the idea that each child must perform certain tasks in a particular order becomes obsolete.

**Role of the Teacher.** The Montessori philosophy rejects the idea that the teacher should be the focal point within a classroom (Eissler, 2009). Children in a Montessori classroom arrive at school, select the lesson and materials they need to complete an activity, and then choose a location in the classroom to work, all without direct instruction from the classroom teacher (Lillard, 2005).

The role of a Montessori teacher is to actively observe the children and give them guidance regarding lessons or concepts (Eissler, 2009). Montessori teachers use their knowledge to plan, organize and deliver concepts and materials that are appropriate for social and cognitive growth (Murray, 2011). To encourage the social and cognitive needs of children, Montessori teachers need to maintain a learning environment that is stimulating to young learners, introduce new lessons and concepts during sensitive periods of development, and offer guidance when needed to support the learning process of the child (Lillard, 2005).

With the establishment of three-hour blocks of interrupted learning periods, the role of the Montessori teacher is to ensure that children have quality time to work through and complete their chosen lessons (Schmidt, 2009). Lillard (1996) shares “When children are concentrating and working independently and without teacher interference, they have achieved the goal of self-direction. The teacher leaves them alone and protects them from interruption” (p. 93). This promotes the idea of learning through autonomy and taking ownership of the different learning processes available within the classroom. In order to present children with three-hours of uninterrupted learning, Montessori education adheres to norms of acceptable classroom behavior and expectations regarding the completion of work (Schmidt, 2009). During weekly meetings or in individual meetings, the teacher and children can discuss classroom behavior, completed work, work in progress, and other classroom related topics. Many times during individual conferences, the teacher and the child will discuss the child’s weekly work plan (Murray, 2011). During this time, the teacher and the child can address areas of concern and fully understand the different work processes the child is working through (Murray, 2011).

To support ongoing conversations between the teacher and the child, Montessori teachers set high expectations for the children in her classroom (Lillard, 2005). In a Montessori classroom, it would not be acceptable for a child to be a complacent learner. The expectation in a Montessori classroom is that each child will achieve academic and social growth with the support of classroom material, lessons, and interactions with teachers and peers (Lillard, 1996). According to Montessori philosophy, when children feel connected to their learning environment through classroom activities and interactions with peers, they rise to the set expectation (Eissler, 2009). The idea that the classroom and conversations are intertwined allows the teacher and the child to establish goals and accountability practices (Murray, 2011). In order to foster

conversations through conferences, children complete daily journaling. Daily journals allow children to “keep track of their own activities and to be accountable for them” (Lillard, 1996, p.99). Daily journals and conferences allow children to establish goals and have a record of accountability in their progress (Murray, 2011). The creation of work plan goals should focus on mastery of content versus performance goals or norm-referenced standards (Schmidt, 2009). A Montessori teacher downplays grades or performance based scores in the classroom (Montessori, 1912/1964). Teacher conferences and daily work journals allow children to see their own academic growth and make adjustments or accommodations that best fit their learning needs (Lillard, 2011).

The use of teacher observations supports the developmental and learning needs of the children in the classroom. When a child is working through classroom assignments, Montessori teachers can observe how the child is working through a concept or skill. Through observations, if needed, the teacher can provide guidance or assistance to the child. In order to provide individual working space and enough room to spread out classroom material, children perform many of the lessons on small carpets (Cossetino, 2006). Ample work space provides the child to spread out his or her work material all while the teacher can closely observe how the child works through the process of the selected work (Lillard, 2005). By doing “onlooker” observations, the teacher is adhering to Montessori philosophy of not interrupting a child in deep concentration and work (Lillard, 1996). If the teacher interrupts the child to help, praise, or even correct, the interaction can disrupt the child’s concentration and direct connection to learning can be immediately disrupted (Lillard, 2005). Observations provide the teacher with valuable feedback regarding a child’s development and learning goals. Observations allow the teacher to

gather information regarding a child's learning process so corrective teaching methods can be discussed and performed during child-teacher conferences (Montessori, 2008).

Child-centered observations allow the teacher to directly see what is of interest to a child. One of the overarching values of Montessori is to allow children to pursue their internal interests (Eissler, 2009). Internal interest allows children to maintain a level of self-determination and motivation in their learning (Murray, 2011). Furthermore, "interaction with the environment is most productive in terms of the individual's development when it is self-chosen and founded upon individual interest" (Lillard, 1995, p.5). Connecting new knowledge to a larger environment allows the child to gain new information and create meaningful understanding of his or her own interest and the newly presented material (Montessori, 1917/1965). When information is presented in a fragmented fashion, the information is isolated and children cannot make complex connections to the material presented (Murray, 2011).

In addition to providing knowledge that connects to the learning environment and beyond, teachers can use what they have learned from child-centered observations and provide the child with more thought provoking questions (Montessori, 2008). Offering children just enough information regarding an area of their own interest, allows for children "to answer questions which they themselves ask, do they commit themselves to the hard work of finding answers that are meaningful to them" (Lillard, P., 1996, p.60). Sparking individual interest in topics allows a child to become an information-seeker, but it also encourages the child's inner motivation to create meaning and order with newly acquired information (Eissler, 2009). The use of curricular schedules and content themes can hinder the unfolding of personal interest and self-motivated learning. Furthermore, set curricula patterns can obstruct inner-motivation and the drive of autonomy within children (Murray, 2011). Children display significantly higher

ratings for intrinsic motivation towards academic school work and curricular goals when presented with the idea of autonomy in learning (Koh and Frick, 2010). As children mature in their academic careers, providing a learning environment that supports intrinsic learning allows the child to use prior knowledge to further connect with ideas and concepts outside the classroom community (Montessori, 1912/1964).

### **Montessori's Prepared Environment**

After the inception and initial classroom practices of Montessori education, European and American scholars maintained that children did not have the intellect or mental capacity to learn academically based concepts until the age of seven (Standing, 1957). Not until Montessori gained recognition on her work with children and her classroom practices did scholars begin to recognize the intellectual impact of working with children at a young age would have on a child's cognitive, social, emotional, and physical development (Montessori, 1988). To bridge the gap from Montessori's actions and the thoughts of educational scholars, Montessori took into account two important factors which other scholars neglected. The two factors include: "(a) *the absorbent mind of the child*, from birth to his sixth year; and (b) the educational importance of the *prepared environment*" (Standing, 1957, p. 263).

In describing "the absorbent mind," Montessori said that "children learn through the natural process which develops spontaneously in the human being. It is not acquired by listening to words, but in virtue of experiences in which the child acts on his environment" (Standing, 1957, p.8). Montessori states that when adults start to notice cognitive, social, emotional, and physical advancements of children, the idea of treating children like mini-adults becomes very prevalent (Standing, 1957). Not only is this theory developmentally inappropriate but it sets children up for unrealistic expectations and can project unrealistic ideals on children. Montessori

explains that, “we have always tended to look upon him as a miniature adult, instead of a being who exists in his own right; one who is, in his own way, as different from us – mentally” (Standing, 1957, 265). To support Montessori’s idea of “the absorbent mind” and the connection to educational practice, educators must create the proper learning environment to foster learning from birth.

Montessori discussed the idea that the learning environment must be prepared to support the teacher – child relationship during the learning process. In order for children to thrive in a learning environment, Montessori suggests, the prepared environment needs to support independence and growth and a sense of protection, meaning that the environment should be calm, orderly, and be free of potential harm. In addition, a prepared environment must strike a balance between material and furniture presented in the classroom. Materials and furniture should appeal to children but aesthetically compete with the function of the material or furniture. Furthermore, Montessori outlined the necessities of a prepared environment by stating that a prepared environment needed to include:

- (1) The materials necessary for the carrying out of the exercises of practical life and similar occupations.
- (2) The sensorial materials.
- (3) The materials for the acquisition of culture – the Three Rs, history, geography, art, handwork, etc.
- (4) Those things necessary for the development of his religious life. (Standing, 1957, p. 270)

## **Montessori Teacher Certification**

Understanding the philosophy, principles, and theories of Montessori education, pre-service Montessori teachers learn how to intertwine all three areas into lessons that support periods of development and the classroom environment (Schmidt, 2009). Furthermore, the role of the Montessori teacher is to maintain a stimulating environment that supports appropriately timed lessons as well as provide guidance and structure within the classroom (Lillard, 2005). In addition to the described roles above, Montessori teachers must understand the practice of observation and use their astute knowledge and perform the task of observation to better serve children within the classroom (Chattin-McNicols, 1958/1995).

Montessori established training courses and the Association Montessori Internationale (AMI) to provide training for novice teachers and continuing education for veteran teachers (Lillard, 2005). To fulfill the ideals of Montessori, training practices need to include personal development as well as the use of materials and lessons. In order for pre-service Montessori teachers to understand the importance of observation within the classroom, Montessori deemed that the practice of observation must be in-depth and over an extended period of time (Montessori, 1917/1965). To ensure pre-service Montessori teachers fully understand the use of observations, the AMI created teacher training that focuses solely on observations, how to properly observe a child throughout a lesson, and how to record what a child is doing throughout an observation (Lillard, 2005). Not only did Montessori create training models that focused solely on observation skills, she also created science-based courses that closely connect to observation skills (Montessori, 1917/1965). Montessori herself voiced concern that traditionally trained teachers would not make good Montessori teachers; she thought traditional teacher

preparation and practices would interfere with the Montessori philosophy and theories (Lillard, 2005).

To further personal development of teachers, Montessori suggested that teachers keep their imagination alive and understand that through observations will see the inner child and that the “child will reveal himself through work” (Montessori, 1917/1965, p.276). The idea that the teacher holds the power to the lessons and the learning process becomes obsolete in the Montessori classroom. Montessori created three stages of personal development of a Montessori teacher. The first stage requires the teacher to become the overseer of the learning environment. The teacher is responsible for keeping up the cleanliness of the classroom and materials so that the children find the materials enticing and relevant to their learning (Montessori, 1917/1965). During this stage, the teacher must also focus on her own appearance and ensure that her movements and action within the learning environment are gentle and promote the sense of calm (Montessori, 1917/1965).

During the second stage of personal development, the teacher provides a learning environment free from harsh feeling or tones (Montessori, 1917/1965). The idea is that the learning environment needs to support learning and to be enticing to curious minds (Montessori, 1917/1965). Montessori also suggested that teachers need to be able to understand their own personality limits and use this newly found knowledge to better serve the children within the classroom (Lillard, 1996). The teacher must also have the ability to create a learning environment that supports the children in the classroom. In order to do so, the teacher must have the ability to determine if behaviors exhibited by children need redirection so as not to disrupt the learning process of the other children in the classroom (Montessori, 1917/1965).

Mastery of the third stage of personal development occurs when a pre-service Montessori teacher fully acknowledges a child's interest in a lesson or concept within the classroom (Montessori, 1917/1965). In addition to recognizing a child's sparked interest, it is necessary for the pre-service Montessori teacher to identify the need for balanced learning (e.g. cognitive, social, emotional, and physical development) while not disrupting the child's curiosity. Recognition and reinforcement of balanced learning is the final and culminating stage of personal development during pre-service Montessori teacher training (Montessori, 1917/1965).

Understanding classroom material and how to present classroom materials is essential in Montessori training. Montessori and the AMI advise pre-service Montessori teachers become embedded within a Montessori classroom to understand the use of materials and how they connect to lessons and concepts (Lillard, 2005). In contrast to traditional teacher preparation, Montessori pre-service teachers typically work within a Montessori classroom for nine months prior to working solely in their own classroom (Lillard, 2005). This training allows the pre-service teacher and mentor teacher to work closely to ensure the pre-service teacher understands and exhibits the role and function of a certified Montessori teacher (Lillard, 2005).

To further Montessori training, the use of lectures and practica help pre-service teachers learn about classroom materials and how to present material in a way that promotes autonomy and motivation within the children (Lillard, 2005). Pre-service teachers not only learn how to use the learning supports properly, they also learn how to provide lesson extensions to help children reach their academic goals (Lillard, 2005). The teacher must know how to properly use the classroom materials so the use of the classroom materials can be introduced and proper use can be demonstrated (Standing, 1957).

### **Accreditation and Affiliation with the Montessori Model**

In recent years, many schools have added “Montessori” to their educational philosophy and vision of their school. However, in order for a school to be considered a true Montessori based school, the school must be accredited and affiliated with one of two internationally known Montessori affiliations. Maria Montessori formed the Association Montessori Internationale (AMI) in 1929 and AMI is recognized as a leading expert on Montessori education (AMI, September 20, 2014). When established in 1929, Montessori’s goal of AMI was to uphold her philosophical and educational beliefs, especially in early childhood learning environments. Several decades later and Montessori’s defining role of AMI has remained intact and guides schools and teaching practices that align directly with Montessori’s original vision of fostering full development of humans (AMI, September 20, 2014).

In order for Montessori schools to be recognized, accredited, and affiliated with AMI, schools must follow AMI protocol that directly aligns with proper teacher training and to the pedagogical standards that Montessori upheld. Annually, AMI offers three levels of affiliation: AMI Recognized, AMI/USA Affiliated, and AMI/USA Associated/Public Schools. AMI Recognized is the highest level of affiliation. In order for a school to have AMI Recognized status, the school must follow all of the AMI standards and educators in the classroom must hold AMI credentials (AMI, September 20, 2014). If a Montessori school cannot meet the specific requirements of AMI Recognized, Montessori schools can be AMI/USA Affiliated or AMI/USA Associated/Public Schools. AMI/USA Affiliated requires 80% of head teachers must have an AMI teaching diploma and the school must meet all the other AMI accreditation standards and requirements (AMI, September 20, 2014). The third level of affiliation is AMI/USA Associated/Public Schools. Accreditation requires that 50% of head teachers hold an AMI

diploma and at least one teacher must be teaching in each appropriate age level. School transitioning to AMI standards and accreditation practices can apply for the associated level until they meet all of the standards of AMI (AMI, September 20, 2014).

The second accreditation organization is the American Montessori Society (AMS). Accreditation and affiliation begins with an “intensive self-study, by the school, involving the school’s entire community—students, faculty, administration, board members, and parents” (AMS, September 20, 2014). The accreditation process examines an array of aspects that are germane to the school setting, areas of focus include, school governance, curriculum standards and models, fiscal and personnel policies, facilities and classroom environment, health and safety practice, teacher and staff preparation, and student outcomes (AMI, September 20, 2014). With the completion of the self-study, the school undergoes a peer review process. During the peer-review process, reviewers determine if the school meets the AMS standards while still adhering to the school’s own educational mission and vision. AMS accredited schools complete annual reports and submit their findings to AMS in the form of a strategic plan (AMS, September 20, 2014).

### **Theoretical Lens**

The foundational lens of this study will be informed by elements of organizational theory (Bolman & Deal, 2008) and constructivist theory (Brooks, 2013). Organizational theory is the study of organizational designs and organizational structures. In addition to design and structures, organizational theory also examines internal and external relationships within organizations (Bolman & Deal, 2008). Constructivist theory is defined by Brooks (2013) as the opportunity to construct understanding that supports learning that is designed, offered, and managed by a teacher. Furthermore, constructivist theory promotes the idea that meaningful

educational activities provide a foundation for cognitive development which supports mindful reasoning and a more positive outlook on learning (Brooks, 2013).

To support the guiding research questions, organizational theory will be used to examine the culture within the Montessori learning environment and how transitioning families assimilate to the new school culture. Bolman and Deal (2008) portray organizations as having a defined culture. In order to establish an organizational culture, it is necessary to understand that culture as both a product and a process. To further develop the notion of product and process, Schein (2010) notes that “the culture of a group can...be defined as a pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration...” (p. 18). When new members of a group enter an existing, established culture and must adapt through a *process* in order to conform to the *product* of the existing culture within the group. To further understand the culture within the school setting, I will examine how families become part of the overall school culture through the notion of process and product during their time of transition.

The lens of organizational theory will also allow me to understand how families create cultural connections within a new learning environment. To help new students and their families understand classroom and cultural connections, Lash (2008) notes that it is vital to nurture a classroom community. Within the larger classroom community, several subcultures will tend to emerge. Children need a classroom environment that allows them to express themselves individually, express their unique personality, and have a safe place to empower themselves with the help of others. Classrooms not only have their own culture but children in a school setting have to contend with the overlying culture of the larger learning system and the underlying influence of peer culture (Lash, 2008). When examining learning communities, one must

understand how it is essential how each cultural influence impacts the behaviors of students who are transitioning into a new environment.

Lash (2008) promotes individuality while enthusiastically building and constructing social worlds through the theoretical framework of social constructivism. Furthermore, children understand, shape, and use environmental information to acquire, process, and construct complex abilities, skills, and knowledge. Social constructivism “recognizes that in the world of the young child there is a simultaneous learning, reorganizing, strategizing, risk taking, and expression of emotions questioning, experimenting, interpreting, and formation of the world and culture” (p. 34). To further develop the idea of social constructivism, Lash (2008) explains that as children enter into a school community, they learn how to comprehend and negotiate rules, and create a classroom community. Not only do school age children begin to build and generate classroom and school cultures, but they also learn how to assimilate into unfamiliar cultures once they grasp the existing culture. The existence of peer culture requires new children to adapt and conform. Through adaptation and assimilation into a peer culture, children new to a learning environment learn how to create relationships and friendships (Lash, 2008). Through the use of both organizational and constructivist theories, school systems can cultivate adaptation and assimilation through the transition practices it establishes.

Intersecting organizational and constructivist theories gives rise to several assumptions, which helped frame data collection and analysis. These include: (1) research indicates children are more successful in transitional practices that involve their families (McIntyre, Eckert, Fiese, DiGennaro, & Wilddenger, 2007), (2) family involvement builds relationships and helps the transitioning child’s academic outcomes, both early in their education and beyond (Kenney, Cameron & Green, 2012), (3) the creation of home-to-school relationships promotes social and

academic wellbeing of children, and (4) families can feel a sense of connectedness to the school with the creation of family-to-school collaborations (McIntyre et al., 2007). Connectivity to a new learning environment allows families to embrace a new educational model and allows families to fully understand how the philosophy and model unfolds in the classroom. Organizational and constructivist theories guided my approach when examining these assumptions.

## CHAPTER III

### RESEARCH DESIGN

This chapter focuses on the qualitative design elements that supported the research goals of this study. Accordingly, the purpose of this study was to explore the transitional experiences of families as they move from a conventional school setting into a Montessori learning environment. This study was guided by the following questions:

1. What transitional issues do the school administrator and staff anticipate and how do they plan for and address such concerns?
2. What practices do families believe are most helpful with their transition into the Montessori learning environment?
3. How do families' expectations of the Montessori environment compare with their actual experiences in that environment?

Furthermore, this chapter explains methodologies used to support the examination of the research questions, the selection of the Montessori learning environment, the participant sampling, the data collection procedures, the process of data analysis, validity, and ethical considerations that ensure confidentiality and protection for study participants, and the Montessori learning environment.

#### **Methodology**

In order to inform the guiding questions, I used a qualitative approach that incorporated reflective written work, interviews, and observations to build three bounded case studies of the participating families. The use of qualitative research provided a seamless methodology for the examination of transitional practices and sentiments when a family transitions into a Montessori

learning environment from a more traditional school setting. Creswell (2013) states that qualitative research allows the researcher to become embedded within the research site and develop a richer understanding of individuals or the environment itself. Subsequently, the more the researcher engages in relationship building with participants and with the research environment, the more the researcher can build relationships and credibility with individuals in the study (Creswell, 2013).

The relationship building with participants and the environment that occurs in qualitative research allows the researcher to use an evolving method when collecting data. Interviews, observations, and the compilation of case studies allow the researcher to refine guiding questions and reevaluate initial data collection means in order to support newly created research modifications (Rallis & Rossman, 2012). Through refinements, the researcher can continue relationships with participants while supporting the needs of the study. In addition to fluid means of data collection within qualitative research, the researcher may discover emerging themes or perspectives. Qualitative research provides autonomy and the ability to investigate newly emerging themes and perspectives (Creswell, 2013).

Qualitative research is inductive, meaning the researcher creates the concepts, hypothesis, or theory rather than testing the type of hypotheses correlated to quantitative research methods (Creswell, 2013; Merriam, 2009). Merriam (2009) further states that findings in a qualitative study are typically inductively derived from data and take the form of categories, themes, theories, and concepts. Creswell (2013) supports this distinction between qualitative and quantitative research and adds that a qualitative researcher tends to sift collected data through a more personal lens, meaning the researcher “cannot escape the personal interpretation brought to

qualitative data analysis” (p.182). Furthermore, the personal-self becomes intertwined within the researcher-self (Creswell, 2013).

Using a qualitative approach for this study allowed me to become embedded within the research site and create a comprehensive understanding of transitional concerns and practices. In order to create rich narratives of participant perspectives, I built three bounded case studies. Qualitative data collecting methods included reflective writing pieces, interviews, and observations which allowed me to more fully develop case study narratives that related to the goals and guiding questions of the study.

### **Case Study**

To more fully understand and create meaning from the study’s guiding questions, I filled the role of a researcher. Qualitative research methods that supported these varied roles included interviews, classroom and school observations, and document analysis (Creswell, 2013; Merriam, 2009). When building case studies, supporting documents, such as reflective pieces of writing, interviews, and observations, allowed me to use triangulation to create a more accurate portrayal of participant responses and in-field observations. Merriam (2009) states that a case study is “an in-depth description and analysis of a bounded system” (p.40). The use of a case study allows the researcher to examine a particular event, program, activity, or individual(s) over a bounded period of time or activity (Yin, 2011).

The case study approach also allowed me to engage with the participant and the environment in which the study takes place. Merriam (2009) states that the use of a case study allows the researcher to draw preliminary conclusions from data collected and start to identify various strengths and weakness that surround research questions. The use of a case study allowed me to more fully understand limitations and strengths regarding transitional practices

and procedures that occur in a Montessori environment. I used interviews and observations to create case studies of each family, which allowed me to be more attuned to individual perspectives. The use of interviews, observations, and case studies aligned within the realm of qualitative study (Merriam, 2009).

## **Method**

### **Montessori School Context**

The study took place at a Montessori school located in a suburban neighborhood, eight miles from a large, diverse city. Accredited through the American Montessori Society (AMS), the school consists of four residential structures and one small building. The school dedicates one structure to toddlers, another to preschool and kindergarten students, a third to lower elementary (first through third grade) students, and the last to upper elementary grades (fourth through sixth). The small building on the property hosts middle school learners in grades six through eight. To allow for expansion, the school has purchased a fifth structure that will undergo renovation to accommodate growth and the school's learning environment.

The school currently serves 31 toddlers who attend two, three, or five days a week, 60 preschool/kindergarten children, 43 lower elementary children, 35 upper elementary children, and 14 middle school children, for a total of 183 children. The school faculty and staff consist of one head of school, with 30 years of Montessori leadership and teaching experience, one office administrator, who holds a degree in business administration and has worked at the school for 13 years, and one admissions administrator, who has maintained and fostered classroom practices and performed admissions duties for 31 years. The faculty consists of four toddler teachers, six preschool/kindergarten teachers, four lower elementary teachers, three upper elementary teachers, two middle school teachers, one Spanish teacher, one music teacher, and one art

teacher. All faculty members hold accredited university degrees and accredited Montessori certification.

### **Elementary Context**

The present study focused on families who transitioned into the lower elementary school learning community. Selecting only the lower elementary setting aligned with when most students and families transfer from a conventional school setting into this learning community (A. Henderson, personal communication, August 15, 2014). The lower elementary school is comprised of children ages six to nine. Broad learning goals of the children in the elementary classroom involve abstract reasoning, increasing a moral sense, and helping students discover the desire to learn about the natural and social world that surround the learning environment (“Learning Communities: Elementary,” n.d., para. 1).

To align with The Eight Principles of Montessori Education, the multi-aged classroom community is designed to allow older students to mentor younger ones. The older students model more mature behavior and problem solving while encouraging younger students to develop their own quest for social responsibility and leadership skills (“Learning Communities: Elementary,” n.d., para. 2). To foster natural learning, the school expects the six to twelve-year-old children to take responsibility for their actions and play a vital role in maintaining the learning environment (“Learning Communities: Elementary,” n.d., para. 2).

The overall design of the school schedule allows for large blocks of uninterrupted time to facilitate interdisciplinary connections. The lower elementary classroom reflects the child’s efforts to order the world through reason. The upper elementary students study the workings of society, and the school supports this learning with research projects and group readings of literature (“Learning Communities: Elementary,” n.d., para. 3). At both levels, students work to

master skills at their own pace in mathematics and language while studying science, history, and geography as a community of learners. This cooperative learning model facilitates both independent study and group work.

In addition to independent and collaborative learning experiences within the school, the children have the opportunity to travel on field trips, thus enhancing the learning that takes place in the classroom (“Learning Communities: Elementary, “ n.d., para 4). Providing out-of-the-classroom experiences that connect directly to the material presented within the classroom allows children to make connections that bridge the classroom to the community (“Learning Communities: Elementary, “ n.d., para 4). To further foster the idea of bridging the gap between the classroom and the community, the Montessori school setting supports community service work. Through such opportunities, children and community members can facilitate conversations that focus on how to be a respectful, contributing citizen within the classroom and the surrounding community (“Learning Communities: Elementary,” n.d., para. 4).

### **Participants**

The identification and selection of the participants aligned with the goals of this study. The participants consisted of three families who have transitioned from a traditional learning environment to the Montessori school setting. In this study, the term family included both parents (and persons acting in the role as parent and cohabitating with the child) and the child or children within each family unit. Because this study focused on families transitioning from a conventional school context, the participants were selected by convenience. I asked the school administrator to recommend families for participation. This ensured that I did, in fact, engage with families who had recently transitioned to the school.

In addition to selecting newly transitioned families, I asked one school administrator and two Montessori certified lower elementary teachers to participate in the study. Due to the nature of the small school setting, both of the classroom teachers interviewed were teachers who worked with the children of families who participated in the family group interviews. The two classroom teachers who participated were also the same two teachers whose classrooms were used during classroom observations. In selecting the school administrator and two classroom teachers, I ensured that each participant had experience within a traditional classroom setting and in a Montessori environment. It was my hope that in selecting educators who had experience in both school settings, the teachers would relate to families who integrate into the new learning community.

In addition to a purposefully selective participant sample, the creation of a collaborative relationship is essential while I worked with the school administrator, classroom teachers, and new families. In order to foster these relationships, I allotted ample time to ensure the goals of the study were met and each participant had an active role within the confines of the study. In addition to cultivating relationships and proper time allotment with participants, I used prior knowledge gained in a previous internship to continue relationship and trust building.

### **Procedures**

This study occurred in six stages. The first stage involved recruitment of the prospective site for the study. The second stage comprised of recruitment of study participants. In total, this study included data collected via family group interviews and school personnel interviews with 16 participants. The third stage included a written reflective piece composed by each family unit that described each family's personal transitional experiences, a one-hour semi-structured family group interview with each participating family, a one-hour semi-structured interview with the

school administrator, a one-hour semi-structured interview with each classroom teacher, three structured classroom observations, and three observations during unstructured play. The goal of the third stage was to develop an overall understanding of participants' perspectives regarding the school transition experience, current school practices aimed at supporting transitions in the learning environment, how the school embeds the Montessori philosophy throughout classroom expectations, and lastly, to what degree do parents and children understand the Montessori philosophy and classroom practices. The fourth stage involved member checking through the use of transcripts. Data analysis of the written reflective pieces, interviews, and observations occurred in the fifth stage. Stage five focused on examining each participant's perspective and discovering themes or recurring ideas shared during data collection in the first phase of this study. During the construction of individual case studies in stage four, I asked participants to clarify or confirm their interview responses. The goal of the fifth stage was to create accurate portrayal that was distinctive and personal to all participants. During the sixth and final stage, I shared emergent findings with the school administration and participants.

### **Data Collection**

#### **Interviews**

To gain information that directly aligned to the goals of this study, I completed three family group interviews, one administrator interview, and two educator interviews. Each individual interview session lasted no more than one-hour, and was semi-structured (see interview protocols in Appendices A, B, and C). Interviews, the primary method of data collection, were used to create personal case narratives that support the creation of the case studies. The use of semi-structured interviews provided a balance for me to ask preset interview

questions, while allowing for flexible conversation to occur between the researcher and participants (Merriam, 2009).

Transitioning families shared their personal perspectives and insights through a group interview that directly related to transitional experiences and their understanding of the guiding Montessori philosophy. The school administrator and two classroom teachers participated in one-hour, semi-structured interviews that focused on school transitional practices. Stringer, Christensen, and Baldwin (2010) note that interviews provide the means for a person to present her “oral history of the local community” (p. 98). Stringer et al. (2010) add that interviews, in addition to providing an oral history, must allow for the description of events, actions, and details within the setting. Interview questions had a focus while maintaining a broad margin to allow for participants to explain responses fully and in their own terms. The use of multiple participant interviews allowed me to gain knowledge through different lenses and provide a well-developed understanding of each participant’s perspective.

In order to gain an accurate account of participant responses during interviews, each session was audio-recorded. Audio-recording permitted me to create written transcriptions of each interview.

### **Reflective Writing**

In addition to family focus group interviews, I asked each caregiver to provide a written reflection that described their transitional experience from a conventional school setting to the Montessori learning community. The use of personal written narrative provides “opportunities to engage in critical and reflective thinking” (Everett, 2013). Reflective writing should be “alert, careful, thorough, definite, and accurate” (Marsh, 1998). Through the use of participant’s reflective writing, I gained additional insight of each family’s transitional perspective.

Reflective writing provided additional perspectives that supported what was shared within family focus group interviews. Everett (2013) notes that reflective writing or journaling can allow for the expression of emotions or feelings that one might not share in an interview setting.

Furthermore and in this study, reflective writing enhanced what was shared within the interview setting. Additional details provided through reflective writing supported the creation of a rich narrative that depicted each family's transitional journey more accurately.

### **Classroom and Unstructured Play Observations**

I used classroom observations to gain a better sense of routines and how school culture unfolds within the classroom. In this study, the use of observations aligned with the theoretical lens of organizational and constructivist theories. Observations provided another area where I gathered additional knowledge and examined practices more in-depth (Merriam, 2009).

Furthermore, I used classroom and unstructured play observations to compile field notes of a realistic learning environment. Field notes consisted of classroom procedures, teacher and newly transitioned child interactions, the classroom environment, classroom materials that support the Montessori Method, and student-to -student interactions that support the development of each case study.

Six, one-hour classroom and unstructured play observations took place in the lower elementary learning environment and occurred at different periods throughout the school day. Varied observation times allowed me to observe the newly transitioned child throughout different activities and interactions. The observation period occurred over a one-month period. During each one-hour classroom observation, I followed the observation form created by the administrator at the study site (see Appendix D). By using the observation tool, I had confidence that the objectives within the tool directly related to The Eight Guiding Principles of Montessori

education. The observation form allowed me to use the same protocol and lens during each observation. With the approval of the school administration, observations were scheduled at a time that was convenient for the classroom teachers. In order to follow confidentiality concerns and abide by Instructional Review Board (IRB) standards, parents were notified that a researcher would be present in the classroom and was informed of the role of the researcher. Audio and video recordings did not occur during observations. After each classroom and unstructured play observation, I checked the observation form for accuracy and completeness prior to leaving the school setting.

### **Participant Narratives: Personal Accounts**

Personal perspectives and insight provided an in-depth, rich narrative that allowed me to examine individual viewpoints as they related to transitioning to a Montessori learning community. Creating case studies provided varied perspectives, awareness, and accounts of participants' feelings, Montessori knowledge, and individual roles within the school setting. In order to provide member checking and verification of details discussed during the interview process, each participant received a copy of his transcript to review. During this participant review process, participants were able to modify personal accounts and check for researcher accuracy.

### **Data Analysis**

In using several methods of data collection (i.e., reflective pieces of writing, interviews, and observations) I understood and more fully examined the different responses and classroom interactions that aligned with the goals of this work. The use of multiple data collection methods promoted triangulation and strengthened the research model. Furthermore, triangulation enabled the “integration of diverse data sources, methods, and disciplinary perspectives” (Briller, Meert,

Schim, Thurston, & Kabel, 2008, p. 245) and allowed the researcher to notice themes or patterns during data synthesizing (Merriam, 2009).

In order to more fully understand themes or patterns within data sets, it is imperative for the researcher to examine each set of findings to identify emerging themes or patterns (Saldana, 2009). To aid in the identification of themes or patterns, I used a coding system. Suggested by Saldana (2009) coding allows for the examination of data and emerging trends. The six interviews, three family group and three school personnel interviews were individually coded for emerging themes or patterns. After each interview response was coded, I performed a cross-case comparison and analysis that examined shared themes or patterns within each data set. To manage the data collected, I followed a three-step, data analysis process. The process allowed me to develop a clear and meaningful understanding of each case study. Each case study followed the same process to ensure credibility and reliability.

The first step consisted of examining reflective pieces written by each family unit. Reflective work allowed me to note any pre-emergent themes or patterns prior to examining interview transcripts. Thorough examination of data collected, I was able to compare and contrast participant transitional experiences. Secondly, I analyzed interview data from each family unit, the school administrator, and two classroom teachers. Throughout analysis, I noted themes and patterns. After each individual data collection set was analyzed and noted with themes or patterns, I performed cross-case analysis that looked for reoccurring themes or patterns.

The third step focused on classroom and unstructured play observation field notes. In collecting field notes from three separate classroom observations and three unstructured play observations, I had the ability to gain additional insight regarding the Montessori Method within

a classroom setting, an unstructured play setting, teacher expectations, and student work habits. I assigned codes to each child and teacher participating in the study. To complete the data analysis process, in the fourth step, I examined both interview transcripts and classroom and unstructured play observation field notes and looked for themes or patterns that did not specifically align with the research goals, but were relevant to the overall findings of the study. Noticed themes, patterns, and differing perspectives allowed me to more fully understand the data collected through the qualitative methodologies within this study. Furthermore, by using this three step data analysis, I was able to create a more complete portrayal of each case study. The use of multiple interview sources and varied classroom and unstructured play observations allowed me to complete a well-developed bounded case that provided perspectives regarding transitional experiences when moving to a Montessori school setting, the overall knowledge of the Montessori philosophy, and classroom expectations once a child becomes a member in the classroom and school community. Subsequently, in examining each bounded case, I applied the different qualities of organizational and constructivist theories. By using these two guiding theories, I looked for commonalities in each case that directly connected to the underlying principles of each theory.

### **Credibility**

Qualitative and educational research practices have significantly changed within the last 20 years (Goldstein, 2007). This shift allows researchers to examine and understand the different social phenomena in various settings (Goldstein, 2007). To complete a more rounded study and to align with the shift in qualitative and educational research, this study used three qualitative strategies to ensure study practices were reliable and credible. By using varied methods of data collection, credibility occurred throughout the study. Creswell (2013) states that credibility

strengthens qualitative research and ensures researcher accuracy through data collection. I used triangulation to ensure integrity and credibility throughout the research process (Briller et al., 2008). The use of participant interviews, classroom and unstructured play observations, and case studies provided for triangulation. Additionally, member-checking allowed each participant to review their own portrayals, as described by myself, to ensure an accurate account of their perspective (Merriam, 2009).

Researcher bias is another area where credibility can be challenged. In this study, I had varied roles within the study's site location. During this study, I also had a child enrolled at the study site. I was also an active member within the school community and supported the school through volunteer opportunities. By holding multiple roles in the school setting, I acknowledge that there could be challenges in differentiating the varied roles. To mitigate this risk, I clarified any bias that could have occurred during the duration of this study, and clearly stated and reflected on these potential sources of bias. Through reflective practice, I created a more open and honest narrative, which allows the reader to understand more fully the goals and objectives of the study. Also, to guard against bias and discrepant information, the use of democratic validity allowed participants to share their personal perspectives and insight regarding the research questions (Hendricks, 2013). In addition to recognizing possible bias, I used triangulation and member checking to help guard against researcher bias.

### **Ethical Considerations**

Throughout this study, the use of precautions to protect participants ensured that no harm or coercion was unduly felt or noted by participants. Participants in the study were adults and children. Parental consent was required for children to participate in family interviews and classroom observations. During the initial meeting with participants, I provided a detailed

explanation of the role of the participant within the study. During that time, I provided information to each participant about the option to withdraw from the study. Each participant signed a consent form and each consent form was on file with the researcher. Furthermore, I made assurances that information shared in the reflective pieces, interviews, observations, and subsequent case studies would remain confidential. Pseudonyms were assigned to participants to ensure confidentiality.

To further ensure participant protection, I solely had access to the data collected and analyzed. Data were stored on a password protected computer that only I had permission to access. This level of security allowed me to maintain participant confidentiality and provide an added layer of protection to participants.

## CHAPTER IV

### FINDINGS

The three case studies presented in this chapter are personal and recount individual perspectives during the overall transitional process into the Montessori learning community. Each interview reflects the uniqueness of each participant while still focusing on the goals of this study. The creation of individual case study narratives provided for the examination of central themes that emerged during this study. Emergent themes from each family case study include: the individual needs of the child, adapting to the Montessori Method through classroom expectations, and school-wide and classroom specific communication practices.

#### **Case #1: The Ready Family**

The following case recounts the Ready family's prior school experiences as well as their transitional journey as they assimilated into the Montessori learning environment. The use of a family focus group interview, a reflective written statement, and classroom and playground observations guided the recreation of their personal transitional experiences. Data analysis focused on encouraging emergent themes: learning experiences with new expectations, individual needs of the child, adapting to The Montessori Method, and aspects of multi-aged classroom. In addition to encouraging emergent themes, data analysis examined undesirable emergent themes such as: the support from the school administrator and the lack of communication practices between teachers and parents.

#### **Prior School Experiences**

Ginny, a curious and vivacious third grader in the Lower Elementary classroom, did not always have a zest for school. Ginny's academic career began at the age of three, when she was

enrolled in a Mother's Morning Out program. She attended the program for one year and her parents did not enroll her in a formal program until kindergarten. Ginny's kindergarten experience was a blend of a formal school setting and homeschooling. Ginny attended the more formal educational setting twice a week and the other three days her mother facilitated homeschool lessons. The Ready family resided in another state during this educational experience and state mandates would not label this education method anything more than homeschooling. During this balance, Mrs. Ready was the primary educator and facilitated lessons on the days that Ginny did not attend the more formal school setting. Over the course of Ginny's kindergarten school year, Mrs. Ready discovered that the blended approach was not working for their family, stating, "I'm not doing this again, this was a miserable experience." With this realization, the Ready family examined other school settings and chose to enroll in a small, private, Christian-based school. Initially, this transition seemed fluid and without complication until the school determined in late June that first grade enrollment numbers did not meet the state's criteria to warrant an additional first grade class. With this late realization and no classroom availability at the small, private, Christian-based school, the Ready family had to reevaluate a first grade school setting for Ginny. However, enrollment timelines and dwindling time before the commencement of the school year left the Ready family with one option: enrolling in the public school system.

When Mrs. Ready initially mentioned the public school system, she said, "public school was a miserable experience." The Ready family resided in one of the best school districts in their area and had expectations that aligned with what the district and statistics were claiming in terms of their overall district ranking within the state standards. The Ready family enrolled Ginny in first grade and hoped that what the district and peers were touting rang true about the

local school and district standards. It did not take long for the Ready family to have differing feelings. Ginny was “miserable” and she called her teacher “mean” and said that “her teacher yelled at them a lot.” Mrs. Ready took an active role in the first grade classroom; she was the Room Mom, so she had a lot of interactions with the teacher. Mrs. Ready stated, “I knew her (teacher’s) personality and stuff, but Ginny struggled a lot.” Within the first few weeks of school, Mrs. Ready shared that the teacher was contacting her regarding Ginny’s academic progress and that she was “going to fall behind and we needed to do something.” Not only did this concern Mrs. Ready, but it was also ‘putting a lot of pressure’ on Ginny.

The Readys had discovered a true disconnect between the education their daughter was receiving and the public relations that the school administrator discussed during their enrollment process. What was unfolding in the classroom differed starkly from what the Ready family had hoped for in this transition. In addition to understanding a new school system, a new learning environment, and a new teacher, Ginny struggled with the newly added pressure. Meeting work expectations proved to be another area where Ginny struggled. Mrs. Ready said that “almost every day” Ginny would spend her recess time finishing daily work that she could not complete during class time. The school only permitted one recess a day, so Ginny would often miss out on recess. The loss of recess also added to the pressure that Ginny felt as a first grader. She not only could not complete her work on-time in the classroom, but she was missing out on opportunities to have fun and socialize with her classmates. Mrs. Ready shared that it truly was not a behavior issue with Ginny, saying “she wasn’t a troublemaker or anything. There was no acting out or anything. It was just a matter of her not getting her work done.” Over the course of several conversations and contact from Ginny’s teacher, she said, “We just felt like the teacher was not very helpful.” This concern compounded and was felt by Ginny. Ginny continued to

feel the pressure but also enjoyed the social aspect of the classroom. As Mrs. Ready said, Ginny is “a very social girl. She loved all her friends but she hated school. And to me, that was just disgusting that a first grader would already hate school and think of it in such a negative [way].” When the Ready family enrolled in the public school setting they were not anticipating this perspective, but it was a reality and one they faced daily.

In order to help combat the negative feelings that Ginny was exhibiting towards schooling and classroom expectations, Mr. and Mrs. Ready took a proactive approach and scheduled several parent-teacher conferences. The overall goal of each meeting was to see if the classroom teacher would offer or discuss further how Ginny could receive support in the classroom and with classwork expectations. While met with resistance in several parent-teacher conferences, Mrs. Ready said:

And there was no offer of help or of, “Well, why don’t we try this?” Or, “Hey, why don’t we—maybe it’d be a good idea for you to meet with the counselor. Maybe we could do some testing that the State could pay for or anything like that. There was none of that.”

With little support and little guidance from the teacher and in another parent-teacher conference, Mrs. Ready asked the teacher, “Do you think she (Ginny) might have ADD?” And the teacher responded, “I am not allowed to speak to that.” That was the end of that conversation. Mrs.

Ready took that response to mean:

That as a public school teacher, I guess there were some pretty strict rules. Maybe if I’d gone to meet with the school counselor. But as a teacher, she may have had her thoughts and suspicions and everything but she was kind of tied. It was against the rules for her to speak to use about this sort of thing.

Without the guidance or a nudge from the Ginny’s classroom teacher, Mr. and Mrs. Ready went forth and had a full “psychological education workup done” on Ginny. The results from the test did “show signs of ADHD.” However, test results came towards the end of the school year, and the Ready family knew they would be relocating to Texas over the summer. With a diagnosis

and limited classroom time left, the Readys viewed the remaining portion of first grade as a waste of time. As they said at the time, “We’ll just get through first grade and then we will figure out what to do next.”

### **Prior Experiences Blended with New Expectations**

During the planning stages of their relocation, the Readys not only focused their attention on selecting a community in which they could integrate into, but also on school selection. The Readys arranged for a school tour prior to their move and arranged for their children to visit the school. When asked about selecting a Montessori-based learning environment and why, Mrs. Ready stated:

Well, we had done our research. We researched lots of different educational styles, from homeschooling to looking into the Christian school we were interested in, where they follow what they called the classical style and we loved that. But we knew about Montessori just from doing the research, but also because we have close friends whose children had gone through Montessori, up through eighth grade. As what a difference it had made for their two boys, who were really—well, the oldest boy was what started it. He was acting out in elementary school, really just constantly getting into trouble and everything, and very bright, a bright boy. They just thought—they finally figured out he was just bored.

Mrs. Ready continued in sharing:

When they put him in Montessori, he just took off. We know other adults at this point who have come up through the Montessori system, and it just seems to make a lot of sense. What we liked about when we researched it was everything; we liked the idea of following the child. Ginny felt so much pressure to keep up with the rest of her class.

The idea of following the individual abilities of the child enticed the Ready family. The undue pressure that Ginny felt from a traditional school environment was very noticeable to Mr. and Mrs. Ready. Mrs. Ready shared the “real issue” that Ginny was feeling pressure from was the clock and “to get things done in a certain amount of time.” The overall grading system added another layer of pressure to Ginny’s academic year. Mrs. Ready continued by stating:

We never emphasized grades to Ginny. What was ironic to me was that she got good grades, right? So, she was probably a B student and we have the teacher calling us saying

that Ginny is falling behind, and that Ginny is a problem and Ginny had issues. And it's not that's she was wrong because she was right but the level of panic she had created. And I don't know if that comes from being in a system where the child has to score a certain number in order for the teacher to continue to have a job or whatever. But it was very much like, "You need to get her up to speed and she doesn't complete her projects." In public school, all the kids work together at the same time on math for an hour, and if you haven't gotten it done, too bad we are moving on.

Mrs. Ready noticed the added pressure from Ginny's teacher and how the traditional practices were heightening Ginny's anxiety level. Mrs. Ready discussed Ginny's ADHD and the connection to heightened anxiety and said, "Anxiety is a key factor in ADHD children" and "they feel a lot of anxiety, generally speaking, but it just made it worse. It just exacerbated it."

When researching the Montessori Method as a more in-depth educational approach, Mrs. Ready wanted Ginny to have more educational freedoms as a young learner and to have more self-pacing. Also, Mrs. Ready emphasized the idea that Ginny, "Would be able to move around the room and that she would be able to complete the project at her pace." Furthermore, Mrs. Ready described the differing visual aesthetics of the two classrooms by stating:

When you walk into a Montessori room, the lights are low, there's usually gentle music in the background and one thing that really strikes me is the kind of neutral tones in the room, the lack of posters and pictures screaming at you, messages. You walk into a public school, every public school classroom I've been in, they always have all these posted and the alphabet and this and that. I just feel like you look around the room and it raises my anxiety, since I've got a thousand messages being screamed at me everywhere I look and I can't just think.

In terms of looking at the classroom environment through Ginny's view, Mrs. Ready said, "I imagine it was really that way for Ginny, too."

In addition to the stark differences in classroom aesthetics, Mrs. Ready said that Ginny had lost a sense of trust when interacting with teachers. Interacting with new teachers created a little uncertainty. Mrs. Ready said Ginny was accustomed to her previous teacher "not being there for her but against her." This thought process was hard for Ginny to overcome. In fact, when Mrs. Ready would ask Ginny about her school day, Ginny would often say, "Mom, I didn't

get this done today, or I just didn't understand this part of this." Mr. Ready continued by asking, "Well, why didn't you go to Mrs. Noting or someone to talk to her about it?" Ginny responded by saying, "I was scared she'd be mad at me." Mrs. Ready commented that this style of conversation went on for months and would have to reaffirm Ginny by stating, "Ginny, these teachers are not against you, they are not going to be mad at you."

### **Affirming Qualities of Transition into the Montessori Method**

An examination of the data revealed positive aspects of the Readys' transitional experience. Constructive themes focus on the individual needs of the child, her ease in adapting into The Montessori Method, and the benefits of a multi-aged classroom.

### **Individual Needs of the Child**

Once Ginny had fully immersed in the Montessori classroom community and established classroom work expectations were known, the classroom teacher approached the Readys to discuss Ginny's ability to focus on class work and finish assignments in a timely manner. After the first six weeks of school, the classroom teachers asked for a parent-teacher conference with Mrs. Ready to discuss Ginny's focus within the classroom. Ginny was diagnosed with ADHD during the previous school year but the Readys' wanted to see if changing the learning environment would still result in the same ADHD outcome. The Readys did not oppose ADHD medication but wanted to try Ginny in the new, Montessori learning environment before deciding on medicating Ginny for her ADHD. In the parent-teacher conference, the classroom teachers told Mrs. Ready:

We've had her for about a month and a half now and this is what we observed and these are the struggles we are having. Furthermore, the teachers shared, she's doing things like she would just kind of wander around the room aimlessly sometimes. She would have her work and just stare out the window and not get her work done.

During this conversation, the teachers asked the Readys how they wanted to approach this concern. According to Mrs. Ready the teachers said, “We are having the same problems” and further stated, “But you handle it, the way you want to. We’re not telling you to medicate your child.” Meanwhile, while the Readys formulated a plan to help Ginny refocus on her class work, Mrs. Ready commented that the teachers stated their interim plan by saying, “What we will do in the meanwhile—which was so great to hear them take initiative, they were like, ‘In the meantime, we’re going to help her breakdown her work into smaller bites.’” Mrs. Ready shared that the teachers were willing to break down class assignments so Ginny could successfully complete her assignments and build on the trust that was lacking from the previous teacher. This level of accommodation and trust building solidified when, as Mrs. Ready stated, “They were willing to break it down and do whatever they needed to do to work with her, which was amazing to me.”

### **Adaptation to the New Montessori Method**

Throughout their research on The Montessori Method, the Readys had a solid, philosophical perspective regarding The Montessori Method and the overall concept of how children moved from one assignment to the next. The Readys’ level of understanding Montessori-specific classroom material decreased as methods such Golden Beads, an addition principle supported with beads that help children understand ones, tens, hundreds, and thousands was introduced to Ginny. In introducing Montessori concepts, Mrs. Ready and the classroom teachers realized that Ginny would understand the overall concept but would get lost in the process of the application. Mrs. Ready stated, “She seems to get a concept—the teachers have noticed that she seems to get the concept, but the process of doing it takes too long—she gets lost in the middle.” Getting lost in the middle of math applications often leads to wrong answers,

which concerned Mrs. Ready. In order help resolve this adaption concern, the teachers continued to make modification and accommodations to help build a solid Montessori foundation for and trust with Ginny.

Adapting to the classroom environment and the new method of learning happened with ease for Ginny. Mrs. Ready believes that Ginny “probably adapted a lot more quickly and easily than I did – they have to, they’re in it.” Mrs. Ready continued by stating, “They laugh at me at home now, when sometimes I pull out some Montessori language. Like they love it when I say they need to restore the environment.” However, when it comes to adapting to new Montessori learning procedures and Montessori specific language, Mrs. Ready explained that her husband was more confident in understanding the specific learning procedures that directly relate to Montessori math concepts. For example, during Dad’s Night at school, Mr. Ready was working with Ginny and Ginny was demonstrating the math skill called Large Bead Frame. During Ginny’s explanation, Mr. Ready noticed that Ginny did not fully understand the overall math concept. Mrs. Ready addressed this concern with the teachers and they agreed that Ginny did not understand the math concept and switching Ginny to a more manageable concept would be beneficial. This realignment solidified the Readys’ feeling that The Montessori Method and focus on individual ability and needs of each child was addressed and supported Ginny as a young learner.

Ginny adapted quite nicely into the new learning environment. Ginny’s main concern in the transitional process was “will I be liked?” and “will I make friends?” Ginny struggled at the beginning of the school year to make friends. The small school setting and the longevity that most of the children have in the school from the age of 18 months can make it more difficult for a second grader to transition into friend groups. Mrs. Ready stated:

It was really hard and I remember her crying a few times about that because I think a lot of the kids—because it is a small private school, they’ve been there since the preschool and as toddlers, so she came in as the outsider and it took her a while to find her place.

Even with this underlying concern, Ginny thought the school was “the most amazing thing ever. She loved the classroom set up. She loved the playground, she likes being in a house instead of a school. She just thought the whole thing was the coolest thing ever.”

### **Thriving in a Multi-Aged Classroom**

The overall idea of a multi-aged classroom appealed to the Ready family. When asked about any concerns regarding Ginny being in a multi-aged classroom with first through third graders, Mrs. Ready shared, “I thought it was fantastic...I thought it was great. Because the children would be able to learn things like helping other children, or going to other children for help.” Furthermore, Mrs. Ready explained that her children discuss how other classmates help out peers, the overall classroom feeling leads to the idea that classmates know who is proficient in a skill, so others seek out that person so they can use that classmate as a resource.

In addition to using classmates as a resource, Mrs. Ready noticed that the multi-aged classroom has provided an avenue for mentorship for Ginny. Mrs. Ready stated, “Ginny thrives on being a mentor. She loves showing the first graders around and how things work. A lot of first grade girls would come to her. She just has that kind of heart of being helpful.”

Subsequently, Mrs. Ready has also noticed that Ginny has had a boost in confidence. When younger classmates ask Ginny for assistance, Ginny mentioned, “They come to me.” In addition to mentoring classmates, Ginny has a sense of ownership in the classroom community. Mrs.

Ready said:

Ginny loves all that kind of stuff. And it’s cool because I as a mom have noticed in her; it gives me a chance to see in her something I didn’t know was there, which was this caring, patient, heart that will work alongside a friend.

However, even with this realization of mentorship and classroom ownership, Mrs. Ready noted that Ginny can be overbearing when it comes to helping peers. Mrs. Ready stated:

Sometimes her problem is that she tries to force her help onto someone who is not asking for help. She sees someone struggle for a few seconds and she wants to jump in. A lot of times, she gets brushed off that way or the teachers will be like, “Let’s back off a minute, Ginny.” That will hurt her feelings, which is too bad. But she loves it.

### **Adverse Qualities of Transition and Classroom Practices**

In addition to beneficial emergent themes, data analysis provided themes that suggest concern or avenues for improvement. These themes emphasized perceptions of limited support from the school administration and the lack of communication between the classroom teachers and parents.

### **Support from School Administration**

While discussing the role and support from the schools’ administration and whether the Ready family felt supported in voiced concerns, Mrs. Ready stated:

The few things that have come up this year that I’ve had issues with, I feel like I have been ignored. I love the school, I love the teacher, and I love the Montessori Method. I feel like the people in-charge of the administration of the school are not administrators. I feel like [the school director] is a Montessorian, she’s an educator but she’s not an administrator. Not at her heart. And I think there is a huge difference and I think you can see it lacking.

This lack of leadership has provided Mrs. Ready with a sense of not feeling valued within the school and by the school administration. This feeling has left Mrs. Ready to examine and question the role of the school administrator.

### **Lack of Communication between Classroom Teachers and Parents**

In addition to administrative concerns, Mrs. Ready voiced concerns regarding the communication practices between school and home. More specifically, the lack of communication between the Lower Elementary teachers and parents. Mrs. Ready explained:

I would love to see them communicate a little more with the parents about what's going on in the classroom and what my child is currently working on, what the expectations are on my child. It can even be "this is what first grade will focus on for the next couple of weeks" kind of thing.

To further explain the need for additional communication from the classroom teachers, Mrs. Ready described how information regarding field trips and class projects are often shared with the parents. When the Lower Elementary schedules a field trip, the parents often receive short notice and minimal details regarding the activity of the trip. Mrs. Ready said, "Sometimes I feel like field trips get sprung on you and I'm like....where did this come from and why didn't I know about this a month ago?" The lack of communication with parents can cause the feeling of disconnect. Mrs. Ready further explained that Ginny arrived home one afternoon and said, "By the way, you have to pack a sack lunch for me tomorrow because we won't be able to bring our lunch bags." This statement caught Mrs. Ready off guard which prompted further questioning such as, "Where are you going? What's going on?" With this type of questioning Mrs. Ready concluded, "We often don't know what's going on in the classroom."

In terms of an appropriate level of communication regarding school projects, Mrs. Ready commented:

At the beginning of the school year, there was a book report due and there wasn't a lot communicated to the parents about the book or about the report, and when the report would be due. Ginny totally missed the deadline. She didn't do the report at all. She got the book read but I think there were several kids in the class that didn't even get the book read.

This lack of communication can hinder how successful a student is in completing projects assigned by the classroom teachers. In comparison to the public school setting that Ginny came from, Mrs. Ready shared that the communication practices were stronger and she had an understanding on projects, project due dates, and what was being addressed in the curriculum.

Mrs. Ready proposed a solution that addresses the lack of communication by explaining:

Montessori doesn't give grades but you could go online and see what their homework was, what projects were coming up and when they were due, all the stuff. But I think from a Montessori perspective, they're like, "Oh well, the children have to learn how to be independent and take responsibility for their work." And I get that, and they do a good job teaching that, but my child is still only eight years old and the other one only six.

Mrs. Ready further explained that even adults "need little nudges sometimes, and so nudging them when we know what's going on, its accountability." Mrs. Ready provided another example of where communication practices could have been improved regarding a book report. Mrs. Ready described before "Christmas break, Ginny lost a book, and they were supposed to be reading this book they were going to do a report on in class." When Mrs. Ready explained to the teachers that the book was lost and now replaced, the overall sentiment was Mrs. Ready did not know that a book report was required after Ginny completed reading the book. Mrs. Ready addressed the role of other parents by sharing:

I know that some parents are overly involved in what their kids are doing, and I'm not like that because I hate school work. I'm always like, "I've already graduated, why do I have to do this?" But at the same time, I just want to know what they are doing, what they're learning.

To further illustrate the lack of communication regarding curriculum themes and activities, Mrs. Ready said that the lack of communication makes it difficult for parents to support their child and support the current themes and activities. For example, Mrs. Ready said, "Let's say they're learning about South America or something and we're out somewhere and see something about Chile I can connect that to the lesson in the classroom, but I don't even know what they're studying." Mrs. Ready suggested that the classroom teachers share with parents a guide that related to course material:

In science, we'll be studying the body, in Cultural we'll be studying Europe...or for third graders, they get to choose a country and this is what they have to do with that. And I know that the math thing is going to be more individualized. I just want to know what they are doing.

Subsequently, Mrs. Ready also suggested that the school provide more information to transitioning families. Not only would sharing with parents upcoming curriculum events and material, Mrs. Ready suggested that the teachers share more regarding school practices:

Sharing information regarding the overall Montessori philosophy, why grades are not used, why your child has to make a work plan every week, or even why your child can't have chocolate or sugar in their lunches, which I think would be obvious, but stuff like that.

For Mrs. Ready, "It's the little nuances and I guess it boils down to the communication again."

### **Case #2: The Waiting Family**

The following case recounts the Waiting family's three prior school experiences as well as their transitional journey as they assimilated into the Montessori learning environment. The use of a family focus group interview, a reflective written statement, and classroom and playground observations guided me to create the Waiting's personal transitional experiences. Data analysis focused on identifying emergent themes: learning experiences with new expectations, individual needs of the child, adapting to The Montessori Method, and the aspects of multi-aged classrooms. In addition to identifying emergent themes, data analysis examined undesirable emergent themes such as the support from the school administrator and the lack of communication practices between teachers and parents.

#### **Prior School Experiences**

Luke, an eager and engaged second grade learner in the Lower Elementary classroom, has had a love for learning and continually seeks new knowledge to apply to his current skill set. Luke's academic career began at the age of five when he his parents enrolled him in a small, public school district. Luke attended kindergarten and first grade in the school district. Luke's kindergarten experience was positive and Luke thrived during the school year. Mr. Waiting stated, "Kindergarten was really good for him. He loved it." This affirmation aligned with the

positive impact Luke's teacher had on Luke during his first year of formal education. Mr.

Waiting described Luke's kindergarten teacher as "really great" and always willing to support

Luke's love for learning even if it did not align with the mandated kindergarten curriculum.

Furthermore, Mr. Waiting stated that Luke's kindergarten teacher:

Recognized very early on that when he (Luke) started acting out in class, it was because he was bored. Her sister (kindergartner teacher's sister) taught first grade down the hall so she would just get work from her for him (Luke), and he (Luke) was really happy.

In addition to quickly identifying Luke as an eager learner and more advanced in kindergarten concepts and skills, Mr. Waiting described how school procedures affected their overall happiness with the Luke's initial school experience. During Luke's kindergarten year, it was school policy that kindergartners be taken to their classroom in the morning and picked up from their kindergarten classroom in the afternoon. This kindergarten policy provided the opportunity for caregivers to have two daily interactions with the classroom teacher. Mr.

Waiting stated:

I took him (Luke) in the morning and my wife picked him up in the afternoon, so we both spoke to his teacher every day, which was great because even if there was just a little something that came up during the day, it was addressed really quickly. You immediately knew about it.

This daily parent-teacher interaction was very beneficial to the Waiting family. Not only did Mr. and Mrs. Waiting understand classroom expectations, but they also knew daily curriculum advancements that Luke was performing through the school day. Luke's kindergarten year ended successful and Luke maintained his zeal for learning.

Over the course of the summer, the school district opened another elementary school and school boundary lines were redrawn. Rezoning caused the Waiting family's neighborhood to attend a new elementary school. This rezoning did not cause initial hesitation with the Waiting family and enrolling Luke in first grade. With the opening of a new school, a different school

administration, and varying school policies, the Waiting family noticed stark differences in Luke's kindergarten drop off and pick up procedure. Mr. Waiting said:

You couldn't walk the kids to class unless you got there extra early and then at pick up in the afternoon, they (teachers) took all the kids to the cafeteria and the kids would sit by class and the teachers were not in there.

This level of limited supervision was alarming to Mr. Waiting and was a stark contrast from Luke's previous school year within the same school district. Mr. Waiting continued by stating:

His (Luke's) friend lives right around the corner from us and went to the same school. So, I took her and picked up in the afternoons. And even the first day, I went to pick her up, she didn't even know that I was coming to pick her up. I just walked in and said, "Hey, your dad told me to grab you today." She said, "Okay" and just left with me and no adult said anything about it or even noticed.

This incident further solidified the difference between the Luke's previous school and the newly opened school. Mr. Waiting was not overly concerned initially about the new school and their differing policies but stated, "It was actually that they were trying to sort of keep it all contained and closed and then on top of it, they weren't successful at it."

In addition to the differing morning drop off and afternoon pick up procedures, Mr. Waiting described how the level of parent-teacher interaction was sharply different. The Waiting family was familiar and comfortable with daily teacher feedback but in the new school and with Luke's first grade teacher, they no longer received this feedback. Mr. Waiting stated there was a sharp absence of, "Hey, how was his (Luke's) day?" Furthermore, Mr. Waiting said that if a parent needed to have a conversation with the teacher, scheduling an appointment was necessary. In the absence of daily communication, Mr. and Mrs. Waiting did receive two notes over the course of two six-week grading periods. Both notes reported that "(Luke) had this really terrible day and just been doing all this terrible stuff." Mr. Waiting assumes that those two notes directly correlated to Luke's receiving unsatisfactory marks on his report card even though his "lowest

graded was a 95 or something like that.” When asked to describe a “terrible day or terrible stuff,” Mr. Waiting said it was probably over “excessive talking in line for lunch or talking out loud while the teacher was delivering a lesson.” Mr. Waiting acknowledged Luke’s tendency to interject ideas that Luke feels are relevant to the information shared by others, even if it has little relevance to the current conversation. Subsequently, Mr. Waiting also stated that Luke’s interjections or actions in the classroom were not “mean-spirited or anything like that.” To further this point, Luke’s teacher mentioned to Mr. Waiting, “Luke often speaks his mind, but he’s growing on me.” This statement caught Mr. Waiting off guard and concerned Mrs. Waiting that it was a problem that Luke spoke his mind.

After the end of the second six-week grading period, Mr. and Mrs. Waiting noticed that Luke “started to come home with all these half-finished worksheets in his backpack, just really easy stuff.” With this discovery, Mr. and Mrs. Waiting realized that Luke’s teacher was “just giving him extra busy work after he finished his normal work in class.” More challenging work would have been more acceptable especially since Luke tested at the end of kindergarten and test results proved Luke was “designated gifted.” Mr. Waiting’s description of the school district’s gifted program was that the programming was “virtually non-existent.” The school’s gifted program consisted of “two hours every six weeks or something ridiculous.” In terms of individualized curriculum planning that supported Luke’s giftedness, Mr. Waiting stated that “they (the school) lumped all the kids that were designated gifted in a class together.” When asked about the curriculum and assignments taught during the gifted pull out class, Mr. Waiting said “extra worksheets” was the extent of the program. To the Waitings, this was not a “huge thing, but it was enough to bother them.”

After the end of first grade, the Waitings' researched local Montessori schools and determined that they could not afford the tuition at the school they selected. With this realization, Mr. and Mrs. Waiting decided that homeschooling Luke for second grade would be their best option. Mr. Waiting stated, "We homeschooled him (Luke) for a year and about the first half of the year, we did pretty good and then it got less and less structured and he was doing less and less." Mr. Waiting continued by commenting, "We weren't letting him sit on the computer all day, or play Minecraft all day, or watch TV all day. He'd end up doing a lot of reading because he loves reading. He's a super strong reader." In addition to becoming more lax with formal lessons, the Waitings "did not have the time or the discipline to really do it effectively." Even with this insight, Mr. and Mrs. Waiting did not have any concerns with Luke's academic advancement because of his early birthday. Luke started kindergarten at the age of five because he was "intellectually ready." The Waitings' said, "We decided if he ends up not getting a whole lot out of this year, we'll send him back to school next year. It's not a huge deal."

### **Prior Experiences Blended with New Expectations**

With two years in the public school system and one year of homeschooling, the Waiting family decided that the Montessori Method would fit the needs of Luke and be a more fitting learning environment. When asked about selecting a Montessori-based learning environment and why, Mr. Waiting stated:

I had read about it even before we had kids. I taught sixth grade at a public school for a year and then worked as a Special Education TA (teaching assistant) in a public school for a year. So even before having kids, I'd read about Montessori and even looking into doing it myself.

Mr. Waiting acknowledged that three transitions in a relative short amount of time provided some concern, but at the same time the family knew the public school setting and homeschooling

were not education ideals. In discussing the three back-to-back transitions, Mr. Waiting reported,

He (Luke) knew that we weren't totally happy with what was going on in first grade. But we always sort of couched it with, "It wasn't bad or anything. It wasn't terrible. Your school wasn't bad. We're not saying that. We just think other things would be better for you."

Mr. Waiting said they were cautious in their wording and did not want Luke to have a negative connotation associated with a public school setting. The Waitings also wanted Luke feel comfortable in his learning environment. Mr. and Mrs. Waiting wanted Luke to have an active voice in his learning and wanted him to be challenged within the Montessori curriculum and classroom expectations. Mr. Waiting stated, "We felt pretty confident that would not be a problem here (Montessori school), because they can move at their own pace." With prior understanding regarding the Montessori Method and general classroom expectations, Mr. and Mrs. Waiting knew this learning environment would best support Luke's social and academic needs.

At the beginning of the school year, Luke was enrolled in the Lower Elementary with an academic focus on third grade curriculum material. However, a few months into the school year, the classroom teachers suggested to the Waiting family that they consider transitioning Luke back down to second grade. In transitioning Luke back down to second grade, Luke could build a stronger understanding of the Montessori Method and classroom expectations. This transition also provided another year of adjustment for Luke, which has allowed him to more fully understand curriculum concepts that directly related to the Montessori Method. When asked to share about Luke's reaction to moving down a grade level at mid-year, Mr. Waiting said, "It was really easy to sell to Luke. It was like, "Hey, how would you like to do a little less homework and be in this class with your friends for another year?" In addition to making this "sell" fairly

easy, Mr. Waiting knew that most of Luke's friends in class were first and second graders, so this transition would be even easier. Mr. Waiting said, "Because intellectually, he's (Luke) there, but emotionally he's pretty young for his actual birth date and just for emotionally where he is. He's kind of an immature eight-year old so that's fine." This statement suggested that the Waitings understand the different realms of cognitive and emotional development. To further underscore their understanding of cognitive and emotional maturation, Mr. Waiting stated, "He (Luke) only gets to be a kid once."

### **Affirming Qualities of Transition into the Montessori Method**

Through data collection and analysis, encouraging themes emerged specific to the Waitings' transitional experience. Constructive themes focus on the benefits of child-centered mentoring in conjunction with a family-based mentoring program, how the Montessori Method and expectations can transcend into the home, and communication between teachers and parents.

### **Mentoring throughout the Montessori Learning Environment**

Prior knowledge regarding how Montessori classrooms are bound within a multi-aged spectrum to promote mentoring was very welcome to the Waiting family. When asked about any concerns regarding Luke being in a multi-aged classroom with first through third graders, Mr.

Waiting replied:

Up until this year, most of the friends he sees outside of school are children of our friends. So, they're all different ages. Some of them older. Most of them younger because we were sort of the first in our group of friends to really start having kids. But most of them are little bit younger. The kids around the corner he (Luke) plays with are a year or younger. And he interacts with kids from all different ages really well. So, I was excited about that because it meant more opportunity for friends.

In addition to building a stronger network of similar-age friends for Luke, Mr. Waiting views a multi-aged classroom as an opportunity for Luke to become a mentor or to assist a classmate in

need. Subsequently, Luke has had many opportunities within the multi-aged class to demonstrate mentoring abilities.

Mentoring opportunities not only arose within the classroom, but newly transitioned families could use the newly established School Ambassadors program to help mentor newly transitioning families. Mr. Waiting stated, “It was nice before school even started, I had an email from somebody and it had a contact that I could use to ask a question.” Mr. Waiting said that this level of contact and immediate outreach to new families is very “nice and it’s nice to have someone there.” Familial mentorship has been an added benefit of instilling Montessori principles through a school to home connection. Mr. Waiting commented that he knew from prior research the benefits of a multi-aged classroom and how mentorship roles and responsibilities could emerge from the concept and has noticed within this school year, their family now has affirming evidence that directly connects to the research-based benefits.

### **Montessori Method Transcending into the Home**

The Waitings greatly appreciated the use of parent education workshops and seminars hosted by the school. When directly asked about the school hosting parent information sessions, Mr. Waiting replied, “Those are great. I like those. I just don’t come to as many of them as I’d like to.” Mr. Waiting suggests that the school continue to offer information sessions for parents. When asked about the importance of the educational events, Mr. Waiting shared, “the fact that the teachers and parents are commingling in the event, I think is really important.”

Parent education workshops and seminars can provide families with additional support through the lens of the Montessori Method. Information shared most often is Montessori-based and can help parents support classroom expectations that are grounded in the Montessori philosophy. In addition to supporting classroom expectations through the lens of Montessori,

informational seminars can build on parents' prior knowledge and further solidify their Montessori foundation. Creating a firm Montessori foundation through the use of parent informational workshops and seminars could foster the use of different Montessori elements within familial homes.

### **Communication between Teachers and Parents**

One of the greatest benefits noted during the Waitings' transition into the Montessori school setting was the increase of parent-teacher communication. The level of communication drastically increased from Luke's first grade year. The new level of communication closely mimicked the level of interaction that the Waitings received during Luke's kindergarten school year. Mr. Waiting stated, "The one thing that I love about this school is that I can sort of waltz into class at any time, unannounced, and it's not a problem." He continued by saying:

Usually when I come in and talk to them (teachers), it's in the morning when I drop them off, because that's when I have a few minutes and with four teachers in there (classroom) so one of them is always willing to just drop what they are doing and come talk to me for ten minutes and it's really appreciated.

When asked what kind of communication practices the Waitings prefer, Mr. Waiting stated, "The format varies. Sometimes it's a phone call, sometimes it will be when I come in and they catch me and say, "I want to tell you about this" and sometimes it's an email." Mr. Waiting also said that the classroom teachers are really good about texting photos of students when they are on a field trip or doing class assignments. An area of improvement that Mr. Waiting suggested was the timeliness of classroom information communicated with parents. More specifically, when discussing field trips or items needed for class, Mr. Waiting noticed and shared, "sometimes the announcements for things are a little short notice." Overall, the Waiting family is satisfied with the level of communication and the varied communication formats but would suggest classroom information regarding field trips, library visits, or items for class

communicated in a timelier manner so parents and students have additional time to plan accordingly.

### **Adverse Qualities of Transition and Classroom Practices**

In addition to beneficial emergent themes, data analysis provided themes that might suggest concerns ripe for improvement. These themes emphasized on supporting students during planning and work time to accomplish set goals and the lag between newly transitioned children in terms of Montessori-specific classroom material and Montessori verbiage used in the learning environment.

### **Planning Work Time and Accomplishing Work Related Goals**

Adapting to a new learning environment can provide many challenges and the challenges can be exacerbated when a new method of learning and planning is expected. Not only was Luke being introduced to a new method of learning but he had also previously been in two different learning environments prior to his enrollment in the Montessori setting. Multiple school settings and expectations can cause confusion and provide a slight delay in mastering expectations in the new learning community. When asked about new classroom expectations and whether he felt that Luke proficiently handled the transition, he replied:

It's been a challenge for him and I even sort of expected that because the hardest part for Luke is managing his own time. And the amount of work that he (Luke) needed to get done in a certain amount of time, and he's easily distracted.

To support Luke during this transition and to help support his time management efforts, the classroom teachers started to use a timer. Not only has this method been effective within the classroom, but the Waitings also implemented the use of a timer in their home. Mr. Waiting stated, "We actually started using it at home for his homework and his chores, like emptying the dishwasher. And he (Luke) really likes it because he feels like he's competing against it." The use of the timer has supported Luke by making him more aware of time on task and how to stay

on task to complete assignments. The timer has not eliminated all distractions. Mr. Waiting further explained that Luke's comfort level in the classroom has increased to the point now Luke would like to spend valuable work time socializing with classmates. This realization was not surprising to Mr. and Mrs. Waiting. Mr. Waiting provided an example of his own work habits that closely mimicked Luke's distracted working habit. Mr. Waiting said that even in his own work:

Once we get a level of comfort, we all kind of relax a little bit. Like a couple of weeks ago, Luke kind of had a bad week where he didn't get his work done because [a classmate] wanted to work with him. This is what [a classroom teacher] had told me. I was like, "Yeah, I know what it is. They've been working together a lot." And I told Luke right in front of her (classroom teacher), "I understand. I went back to school this weekend. I didn't get any work done because I hadn't seen my friends in a month." So, my friend came by and asked if I wanted to go to lunch and I said, "Yeah, I do as a matter of fact."

Through this conversation, Mr. Waiting said that within the Montessori setting, oftentimes the expectation of being proficient in time management is an easy skill, but in reality even adults struggle with this skill.

### **Montessori-based Materials and Verbiage**

To understanding Montessori-specific material and vocabulary has required the Waiting family to have additional contact with the classroom teachers. Mr. Waiting recounted how Luke unsuccessfully described his weekly work plan, which required Mr. Waiting to meet with a classroom teacher for a more in-depth description of Luke's weekly work plan. When asked about specific Montessori vocabulary that directly relates to mathematical concepts, such as Golden Beads or Checkboard, Mr. Waiting stated, "Those are actually a couple of terms I haven't heard from Luke or from the teachers." To further illustrate Mr. Waiting's reference that Montessori-specific language was not transferring into the home, Mr. Waiting witnessed Luke manipulating mathematical tiles in the classroom during a class demonstration; however, the

concept or desired skill was not communicated nor was the reason for using Montessori-specific tiles part of the demonstration.

### **Case #3: The Alert Family**

The following case portrays the prior school experience and the transitional journey of the Alert family as they integrated into the Montessori learning environment. In-depth examination of each case provided common themes from their transitional experiences as participants moved from a traditional school setting to the Montessori learning environment. Cross-case analysis exposed overlapping key elements that directly connect to each personal journey through the transitional period. Each study participant revealed:

- The need to understand the Montessori philosophy and how the underlying Montessori Method unfolds in the learning community.
- Communication practices are essential to bridge the knowledge gap that is directly related to classroom expectations.
- Building motivated learners through the use of autonomy-based learning environment.
- Classroom expectations and practices foster the idea that the learning environment is an interconnected community where all members have an active role.
- The Montessori Method can transcend into the familial home which can promote the notion that the Montessori Philosophy and Method are not exclusive to a classroom setting.

To appreciate the individuality and collective narratives of each participant, these commonalities will be examined and discussed. Focus group interview, a reflective written statement, and

classroom and playground observations guided my creation of their personal transitional experiences. Data analysis focused on the following supportive emergent themes: the value of process learning over product outcomes, a direct connection from classroom community expectations to expectations within the family home, and building confident learners. In addition to the supportive emergent themes, data analysis indicated an overarching emergent theme of needed improvement that can correlate to the misrepresentation of the Montessori Method and how some families may have an inaccurate portrayal of a Montessori learning environment.

### **Prior School Experiences**

The Alert family has a lengthy connection to the Montessori school in which this study takes place. As a small child, Mrs. Alert attended preschool at the school and has several fond memories that directly connect to her level of understanding of the Montessori Method and the classroom expectations. However, not until Mrs. Alert enrolled her three children in the school did she start to notice the stark contrast between the conventional schooling environment that two of her children were enrolled in and the Montessori learning community. When asked what prompted her family to move from the top-ranked elementary school within the same city to the Montessori school, Mrs. Alert stated, “We moved to be close to [elementary school’s name] because [elementary school’s name] is a ten out of ten.” After two years of schooling, Mrs. Alert began to realize “that a ten out of ten means more pressure on the teachers, which trickles down to be more pressure on the children.” This realization made Mrs. Alert apprehensive but not enough to warrant a change in schooling environments. One afternoon after Mrs. Alert’s daughters returned home from school, Mrs. Alert and her two daughters discussed the overall testing and grading systems within the public school setting. From their conversation, Mrs. Alert was prompted to consider her children’s sentiments regarding the current testing and the grading

system with the public school setting both daughters attended. Mrs. Alert stated, “My children looked really stressed out about a test.” Mrs. Alert tried to calm her children’s fears regarding the testing process by telling them, “the test is going to be fine, it is on the level of where you are [academically] and it [the test] is just to see where you’re at [academically]” but deep down Mrs. Alert knew that the test score was not an indicator of her children’s worth within the classroom, but rather a number used by the school system to track academic ability and the schools overall worth in the community.

The Alert’s youngest, preschool-aged son attended the Montessori school while the Alert’s two older daughters attended a local, top-ranked public elementary school. It was not until the previous school year ended that the Alerts started to consider the Montessori setting for their two daughters. The Montessori learning environment offers a summer enrichment program for preschool and school-aged children during the month of June. Mr. and Mrs. Alert thought the summer program would provide an activity for their children but had no intention of enrolling their two daughters in the Montessori setting.

After attending the first day of the Montessori enrichment program, the Alerts were shocked with the response from their two daughters. Mrs. Alert recounts one daughter stating, “Oh Mama, this is very different.” Mrs. Alert added, “Mama, we didn’t waste time, like nobody had to waste time. Like you can keep going until the end of the day, we didn’t have to waste time.” Mrs. Alert began to question her two daughters about the idea of “wasting time” during the school day in their typical school setting. To further the conversation, Mrs. Alert asked one of her daughters to explain in a little more detail what she meant by “wasting time” and whether they wasted time in the classroom during the regular school year. Mrs. Alert’s daughter said:

Yes, if I'm done, then that's it. I'm done and I cannot...I wait. And I wait for everybody to get done. If somebody's slower, if they're a slow learner, and they're struggling, then I have to wait for them. I can't move on, it's not at my pace.

Hearing this reflection from her eight-year-old daughter was startling to Mrs. Alert. Through this conversation, Mrs. Alert began to reflect on her own schooling and how from her own personal Montessori schooling she could not relate to what her daughter was sharing in relation to "wasting time" during the school day in the public school setting. Mrs. Alert stated, "I have never wasted time, so I could not relate to the fact that this was going on." This disconnect prompted Mrs. Alert to internally compare the two contrasting schooling environments and she soon discovered that her children had "never had an association to where they could compare different school settings." Furthermore, in her reflection and through conversations with her daughters, Mrs. Alert asked her daughter, "When you're wasting time, why didn't you bring it to my attention?" But Mrs. Alert quickly thought to herself, "They wouldn't know how to do that."

Through just a few brief conversations with her daughters, Mrs. Alert began to reflect on the current classroom practices that her two daughters followed to in the top-ranked public elementary school. What struck Mrs. Alert first, was the fact that her two daughters thought that "wasting time" was a typical classroom expectation in their conventional school setting and, secondly, the difference in how the child and the child's ability are viewed differently in each educational setting. To further illustrate this idea, Mrs. Alert discussed a stark contrast in terms of parent-teacher conferences. Mrs. Alert described the first time she attended a parent-teacher conference in the traditional school setting and how it sharply differed from her Montessori parent-teacher-child conferences. Mrs. Alert was expecting the conference to involve the parents, the teacher, and the child but that did not occur. In this particular school setting, children do not play a role in the parent-teacher conferences. Another alarming detail that Mrs. Alert described was that the conference revolved around numbers. For example, Mrs. Alert said

that the teacher in the traditional school setting said, “She got a 60, she got this...they were giving me numbers.” Mrs. Alert was fine with correlating numbers to assignments but did not receive any feedback to her additional questions that focused on growth. Mrs. Alert’s asked “How did my daughter get better at these things, as a better person, or a better reader, or a better learner?” The idea that the teacher focused on product over process was alarming to Mrs. Alert, which prompted her to evaluate what desired outcomes she wanted for her children from a conventional school setting.

When asked about deterring young learners from being number driven or having their value in a classroom directly tied to a number ranking, Mrs. Alert shared that both of her daughters “are really sensitive because both of them push really hard.” Mrs. Alert connected this idea to the “growth mindset” (process learning versus product learning) but correlating value and worth with a number value was not motivating her daughters to work harder, in fact, it was causing both children to question their self-worth. Mrs. Alert said when the school issued report cards with behavior marks, behavior marks were in the form of “E [excellent], S [satisfactory], and N [unacceptable] both of her daughters felt judged. The first semester both of her daughters received S [satisfactory] marks which prompted some confusion. Mrs. Alert described that both of her daughters were “hurt by the fact because they were judged.” One daughter shared, “I listen quietly and I cooperate, why did she [teacher] put a S instead of an E?” Mr. and Mrs. Alert tried to explain to their daughters that this behavior mark was more than okay and was not a true representation of their behavior. Mr. Alert added that he shared with his daughters:

She [teacher] probably needs more time to get to know you and that’s why she’s probably not giving it to you. It’s okay, the more she knows you then she’ll probably give you excellent. She probably has high expectations, that’s why she’s doing it.

Mrs. Alert continued by sharing that their daughters were “beating themselves up over the fact that they received an S over an E.” This realization startled Mrs. Alert and soon she began to

think about her own Montessori background and how numbers or letters did not correlate to self-worth or value. To further solidify the idea that a number system should not define worth or value, Mrs. Alert said, “I want my children to feel good about themselves and not have a number define them.”

### **Affirming Qualities of Transition into the Montessori Method**

Data analysis revealed several themes related to the Alert’s transitional experience. These included: the focus on process over product learning, transcending school expectations into the familial home, and building confident learners.

### **Process over Product Learning**

Reflective thought with prior parent-teacher conferences and a traditional report card system led Mr. and Mrs. Alert to focus on the idea of process over product learning. During the first day of the Montessori enrichment summer camp, the Alert daughters discovered an encyclopedia. Mrs. Alert shared that the daughters were giddy and said, “You don’t have to go on Google, you can actually look things up and there’s a way to look it up.” This newly discovered method of looking up information prompted a further discussion about the process of looking up material and how to use paper resources versus digital resources that are often more widely used. Mrs. Alert shared that her six year old was intrigued with the Montessori math material and astounded that she could learn how to solve math problems all while understanding the “why” of mathematical processes.

Not only did the idea of looking up information in a reference book or working a math problem with manipulatives excite the children, but also the girls were excited about exploring new concepts and ideas. Mrs. Alert explained:

That they didn't know the simplest things to look up and they appreciated that and actually pointed that out. That's how much a difference they were feeling, as people, as if they had been opened up to a new world of things.

Furthermore, the girls shared, "This is just a different world, I want to explore this, I want to get into this, and I want to dive into this." This newly acquired "thirst, strive, and drive" was something that Mr. and Mrs. Alert had not witnessed before in their daughters learning.

In addition to understanding curriculum practices had functional processes associated with each concept, the idea that each child could learn at her own pace solidified the idea of process over product focused learning for the Alert family. When the Alerts' two daughters entered into the Montessori learning environment, the pace of learning was drastically different from their previous school setting. Not only was the learning pace different but understanding the reason behind educational concepts did not exist. This discrepancy became apparent when the Alert's youngest daughter was struggling in reading. Not only did their daughter lack the proper foundation such as parts of speech, sentence structure, or even word syntax, but also her reading level was promoted based on the reading skill of her classmates. When introduced to proper foundations in reading, the Alert's daughter was able to advance her reading skill. The overall process of understanding different reading concepts and skills supported Mrs. Alert's daughter and allowed Mrs. Alert's daughter to become a more confident and successful reader.

To further the idea of process over product learning, Mrs. Alert explained how each piece of Montessori material had a purpose. In order to understand the benefits of process over product learning, Mrs. Alert also argued that children and parents need to understand the purpose of classroom materials. Furthermore, Mrs. Alert stated, "Everything is very purposeful and that foundations are set so we understand why we use certain material for certain concepts." In addition to discovering the purpose of materials, Mrs. Alert firmly believes that children become more purposeful in their own process over product based learning.

### **Transcending School Expectations into the Familial Home**

The idea of bridging classroom expectations with home expectations was appealing to Mr. and Mrs. Alert. Mrs. Alert described several instances from their previous school environment where children were not held accountable and did not serve an active role in the overall classroom community. Through different interactions with different caregivers, Mrs. Alert began to realize that her children were not being held accountable through ownership within in the classroom environment, which was allowing them to feel more lax in their own home environment. Mrs. Alert did not think of this overlying feeling until she started to reflect on her own children and their sense of entitlement that was beginning to filter into their family. Mrs. Alert provided the example that many of her children's friends did not have responsibilities within the household that supported the needs of the home and family members. This thinking alarmed Mrs. Alert and brought her to the realization that it was time to encourage her children to think of their familial unit as "a team and we are collectively doing everything." Mrs. Alert's prior Montessori experiences guided her shift in thinking and she began to foster changes within her own family that promoted the sense of team work and responsibility.

Within a typical Montessori classroom, each child has a responsibility that supports the classroom community. The Alerts' daughters were fulfilling classroom duties such as sweeping the classroom floor, cleaning lunch tables, or restoring materials to specific shelves after using such materials. The idea that if the children were accomplishing such tasks within the classroom, such skills can transfer to the home which supports the idea of bridging the school and home environment.

This shift in thinking also helped eliminate the feeling of entitlement they felt at the previous school setting. Mrs. Alert voiced a concern when one of her daughters could not

understand why she had to sweep the household floors, vacuum bedroom carpets, or fold her own laundry. This thought solidified Mr. and Mrs. Alert's desire to change their household responsibility list to more closely align with the classroom roles and responsibility list that the children were performing in the classroom community.

### **Building Confident Learners**

One of the areas that Mr. and Mrs. Alert voiced concerns was on how the public school system used grades and other qualifiers to label children. Initially, Mrs. Alert did not view this practice as harmful but after reflection and conversation with their daughters the Alert's determined that their daughters were becoming less confident in their ability as young learners. Not only did the Alert's want the school environment to build confident learners, but also wanted their children to become "a better person, a better learner every day, and grow to become better people."

Mrs. Alert noticed a shift in her daughters' thought when labels, numbers ranking, and other qualifiers were removed in the Montessori school setting. Mrs. Alert shared that this mental shift became apparent when she was working with one of her daughters on a project and her daughter said, "I want to know the answer to this, but I don't want you to tell me Mama because I'm able to do this." This shift in her daughter's thoughts was the first time that Mrs. Alert felt that her child fully accepted her role as an active learner and held her own will and drive to excel in her own learning.

In addition to building a child's confidence as a learner, Mrs. Alert believes that the Montessori environment is building self-assurance within her children. Mrs. Alert stated:

They're very assured of the information that they are giving me is correct, because they have gone through it, they have collected it. They have a sense of responsibility, of giving me some information...there is the story behind it, there is a reason that I know

this information. A whole side of the world has opened. Of course, when you're sure of something, your confidence level increases.

Mrs. Alert also shared that she associates an increased level of confidence with the idea that when children are comfortable in their environment the sense of comfort allows them to experiment with new concepts or ideas. Gauging a level of comfort can differ from child to child and Mrs. Alert noticed that once her daughters felt comfortable in the learning environment they were eager to connect to concepts that proved to be more difficult in their conventional school setting. Mrs. Alert shared that her daughter struggled with grammar in her previous school setting but once she had a solid foundation regarding grammar in the Montessori setting, her daughter was excited to read more advanced material and complete more complex activities.

Mr. and Mrs. Alert noticed that their daughters were beginning to take ownership of the material they were learning in the classroom. Mrs. Alert said that in conversations with her daughters she noticed that their level of comfort was directly correlated to their self-confidence.

Mrs. Alert provided a synopsis of their conversation and shared that her daughter said:

I'm going to learn this later, it's okay. I just don't know it right now. I'm not going to be any less if I don't know it today. I'm going to know it tomorrow, but I just have to work towards learning it.

Mr. and Mrs. Alert noted that this new attitude towards learning and valuing yourself as a learner supports the idea that progress learning that is highly valued by the Montessori learning community.

### **Adverse Qualities of Transition and Classroom Practices**

In addition to beneficial emergent themes, data analysis revealed misrepresentation of the Montessori Method and how some families may have an inaccurate portrayal of a Montessori learning environment. This one theme could be unfavorable for the Montessori learning community and reported as a concern.

### **Misinformed Portrayal of Montessori Learning Environments**

In discussing all of the different elements of Montessori education and how the philosophy unfolds in the classroom, Mrs. Alert shared from her experience that a lot of people do not understand the philosophy and the Montessori Method. This lack of knowledge can lead to unwarranted judgment and criticism that can taint how people view the school and the current practices within the school setting. In order to prevent further misjudgments and misconceptions, Mrs. Alert supports the idea of research. To fully understand a new concept or educational approach, Mrs. Alert suggests that those who are interested in the Montessori Method do in-depth research to form a better understanding of the philosophy and classroom expectations. Also, Mrs. Alert believes that researching and understanding any educational method is fundamental but she also firmly supports the idea that participants must “believe in the system” in order to have a fully developed understanding of any educational approach. Furthermore, Mrs. Alert is aware that the Montessori philosophy and Method do not align with the majority and their views on education.

## CHAPTER V

### CROSS-CASE ANALYSIS

Elements of organizational theory (Bolman & Deal, 2008) and constructivist theory (Brooks, 2013) inform this qualitative study. The use of organizational and constructivist theories allows for critical examination of the three bounded case studies created to understand transitional experiences as families move from a more conventional school setting to a Montessori learning environment. Cross-case analysis provides the opportunity to intentionally deconstruct each case to understand participants' transitional experiences and expectations as they entered the Montessori school setting. While each of the cases is unique and reflects personal stories, cross-case analysis also highlights commonalities and differences that may allow each personal story to connect to the other cases within the study. Participating families shared a common characteristic prior to their involvement in the study; a child of each family had previously attended a conventional school setting prior to enrolling in the Montessori learning environment. Furthermore, each participating family attended a public elementary school setting preceding their enrollment in the Montessori community. This school setting dichotomy allowed for the development of commonalities and differences throughout each unique transitional experience.

#### **Emerging Themes during Transition**

In-depth examination of each case provided common themes from their transitional experiences as participants moved from a traditional school setting to the Montessori learning environment. Cross-case analysis exposed overlapping key elements that directly connect to

each personal journey through the transitional period. Themes that emerged in some way in each case included:

- The need to understand the Montessori philosophy and how the underlying Montessori Method unfolds in the learning community.
- Communication practices are essential to bridge the knowledge gap related to classroom expectations.
- The Montessori Method builds motivated learners through the use of autonomy-based learning environment.
- Classroom expectations and practices foster the idea that the learning environment is an interconnected community where all members have an active role.
- The Montessori Method can transcend into the familial home, which can promote the notion that the Montessori Philosophy and Method are not exclusive to a classroom setting.

This chapter will examine and discuss these commonalities among and across the three cases through the lens of the guiding questions.

### **Research Question One: Anticipating and Planning a Transition**

*What transitional issues do the school administrator and staff anticipate and how do they plan for and address such concerns?*

### **Understanding the Montessori Philosophy and Method**

The school's headmaster and two classroom teachers reported that when families first inquire about the Montessori school, one of the first inquiries with potential families involves their familiarity with the Montessori philosophy and how the Montessori Method unfolds within

a classroom setting. The headmaster recommended that prospective families tour the school to gain additional knowledge regarding the Montessori philosophy. Not only can a school tour provide additional Montessori knowledge but perspective families can see other children performing Montessori-specific tasks and lessons. The headmaster also mentioned that during tours she educates prospective families on The Guiding Principles of Montessori Learning. In highlighting the different guiding principles during a school tour, the classroom teachers said that they can perform classroom demonstrations that support both home and school environments. All three school personnel commented that they find it hard if teachers expect set practices at school but parents do not expect children to follow these practices at home. This disconnection can lead to disequilibrium during the transitional period and can hinder the building of the home-to-school connection. Furthermore, differing expectations can prolong the transitional process that which can provide added difficulty with integrating into the school environment and culture.

### **Home-to-School Connections**

In addition to understanding the overall Montessori philosophy and the home-to-school expectations, the headmaster recommended that caregivers take an active role during morning drop-off and afternoon pick-up times. The daily interactions with classroom teachers can solidify a family's buy-in to the Montessori philosophy and support families during periods of transition. Both educators commented that daily interactions can help caregivers feel connected to the learning environment and classroom expectations. To further build a connection to school and classroom practices, both educators advocated that caregivers do several classroom observations to see firsthand the use of Montessori-specific materials within a classroom setting and how materials can support the Eight Guiding Principles of Montessori Learning. By focusing on classroom expectations and bridging school expectations with home duties,

caregivers and children begin to understand the Montessori philosophy in greater detail and application of the Montessori Method becomes easier.

The period of transition into the study site typically takes four to six weeks. A successful transition is often evident when a child demonstrates enjoyment in the learning environment and has steady academic gains (Monkevicienė et al., 2006). Hanewald (2013) states that a significant part of adjusting to a new learning environment is the sense of belonging and the child's overall level of well-being. If a student has a "high sense of belonging, the feeling of social connection and being socially connected may lead to higher motivation and grades" (Hanewald, 2013, p. 64). In order for families to feel a sense of belonging to the school community, the headmaster and educators suggested that families interact with school personnel frequently and begin the process of cultivating friendships with classmates. During the interview process, the headmaster and both educators said that if children see their parents invested and involved in the new learning environment, the child will assimilate into the new school setting more quickly. Building familial friendships can accelerate the assimilation process and allow newly transitioning families to feel a sense of belonging and connectivity to the school environment.

### **Understanding School Culture and Climate**

In terms of tailoring individual needs of the child during the transitional period, both educators said that transitioning children tend to articulate difficulties and demonstrate the ability to ask for additional support. The headmaster supported this notion and continued by stating that school climate and culture support different learning abilities through the use of process learning over product driven results. Focusing on process learning allows educators to make modifications and adaptations to the skills presented with the classroom. Not only can educators

tailor learning goals for each child, the school promotes the idea that each child is unique, but also each weekly work plan for each child will reflect varied levels of learning.

Moreover, each respondent said that the school culture and classroom climate played a pivotal role in how families assimilate into school setting. Schein (2010) notes that “the culture of a group can now be defined as a pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration...” (p. 18). These assumptions solidify the idea that each child is an individual and each family has a unique transitional experience during adaptation and integration into a new learning community. Augst and Akos (2009) state that “transition planning is essential in schools in order to encourage academic achievement for all learners” (p.3). The headmaster and both educators concluded that their current school practices to support transitioning families and align with best practices and research-based evidence.

### **Recommendations**

The prominent themes that emerged from the headmaster and educator perspectives directly connected to understanding the Montessori philosophy and method, the importance of maintaining similar home-to-school expectations, and understanding the school’s climate and culture. Prior Montessori philosophy and method knowledge can ease many transitional concerns, especially concerns that relate to classroom arrangement and practices, Montessori specific material, and the role of the teacher and student within the classroom setting.

Montessori knowledge can also facilitate the connection between home-to-school expectations. Caregivers and school personnel can begin to build similar work and character expectations of the child. By collaboratively working together and maintaining similar home-to-school expectations, the child can begin to take ownership of his actions and begin to build

accountability within each environment. Understanding school culture and climate will allow families to integrate into the learning environment more smoothly. The use of school tours, interactions with school personnel, students, and other families within the school setting can provide a glimpse of the school culture and climate. Interactions with varied roles within the school can help solidify the overall understandings of the school's climate and culture.

Integrating Montessori knowledge, home-to-school connections, and understanding the overall climate and culture of the learning environment can support families as they transition from a traditional school setting into a Montessori learning community.

### **Research Question Two: Supporting Transitions and Family Needs**

*What transitional practices do families believe are most helpful with their transition into the Montessori learning environment?*

#### **Prior Montessori Research and Knowledge**

During family focus group interviews, all three of the families mentioned that prior knowledge of the Montessori philosophy played a role in their overall transition. Each family had a varied level of understanding of the Montessori philosophy and how the method unfolded within the classroom but individual knowledge that each started the school year with provided a solid foundation. Mrs. Alert has a more in-depth understanding of school and classroom expectations since she attended the same Montessori school as a young child. To further support Mrs. Alert's knowledge and to reacquaint her with the philosophy and classroom expectations, Mrs. Alert enrolled her youngest child in the Montessori school prior to transitioning her older two children from the local public school system into the Montessori school setting. Mr. Waiting researched the philosophy when he was an educator in the public school system. Through examining different school settings for his child, he performed additional Montessori

inquiry to add to his previous research knowledge set. Additional research familiarized Mr. Waiting with the Montessori Method and guiding elements embedded within the Montessori philosophy. Lastly, Mrs. Ready had prior knowledge regarding Montessori from interactions with family friends. An unpleasant prior school experience and a move to another state prompted Mrs. Ready to examine the Montessori philosophy through a more concise lens. Further investigation and additional conversations with others who had direct connections to the Montessori learning communities added to Mrs. Ready's foundational knowledge.

Prior Montessori knowledge provided all three families with a foundational understanding of the Montessori philosophy and possible classroom expectations. Researching each guiding principle that supports the overall philosophy can provide caretakers with a deeper level of comprehension. Furthermore, in order to understand classroom practices that directly connect to the Montessori philosophy, school personnel can demonstrate to caretakers and children how each classroom practice is aligned with the overarching philosophy and method. Using Montessori specific classroom material to support classroom demonstrations can build on prior knowledge while increasing overall knowledge of the Montessori philosophy and method.

### **Integrating into an Established School Culture and Climate**

All three respondents commented that the overall climate and culture of the school made their transitional experience positive. Augst and Akos (2009) argue that "if students and families are supported during these times of transitions, students will have more opportunities to be successful and schools will be initiating enhanced relationships with families from the start" (p. 4). Mrs. Ready and Mr. Waiting were at a somewhat disadvantage in regard to Mrs. Alert and her prior knowledge about the school and the relationships she had cultivated through her connection to the preschool setting with her youngest child. In terms of understanding school

expectations, all three respondents knew the new school setting would be different from their previous school placements. The idea that the headmaster and classroom educators promoted caregiver involvement on a daily basis was a welcomed change. Daily conversations with school personnel regarding school and classroom expectations provided for a quicker assimilation into the new learning environment.

The “open classroom policy” made understanding Montessori-specific content easier to understand. Watching the use of Montessori materials during classroom observations provided these parents with a deeper sense of appreciation for the Montessori philosophy. This newly found appreciation allowed each caregiver to connect to classwork expectations and the overall concept of process learning. Creating this level of support for caregivers and children eased transitional anxieties and promoted the ideas of belonging and connectedness to the Montessori environment. LaCava (2005) believes that transitions are an ongoing process that should be supported by patience and flexibility within the learning environment.

In addition to patience and flexibility, it is also helpful for school personnel to remember transitioning families may not be aware of school activities and events such as field trips, school protocols for items such as library books, school visitors, drop off and pick up procedures, and lunch guidelines. During a transitional time, it is important for school personnel to take into account that newly transitioned families may not be aware of all the school policies and procedures that existing families are already accustomed to following. Providing additional information that directly relate to school policies and procedures can support families as they transition into a new learning environment, especially if the family transition within the school year and not in the beginning of the school year when most school policy and procedure information is distributed.

### **Communication Practices Support Transitioning Families**

Communication practices done with the learning environment are critical when families transition into a new school environment, especially an environment that does not align with traditional education-based philosophy or methods. Mr. Waiting and Mrs. Ready discussed in more detail the lack of information that is provided in communication from classroom teachers. Although caregivers can visit the classroom or check in with teachers when a question may arise, both voiced that classroom information that teachers often provide regarding classroom activities and lessons is often done with short notice or limited detail. This lack of information has caused frustration and has hindered parental involvement in regard to field trips or other class projects that require caregiver support. On the contrary, Mrs. Alert did not voice a concern regarding classroom communication practices.

In terms of overall school communication, all three participants believed the weekly school-wide electronic newsletter is helpful and provides an extra layer of knowledge regarding school-wide events. Even with all three participants stating they valued the school-wide newsletter, the newsletter does not cover important information such as project due dates, library field trips, or other Lower Elementary specific information. Mrs. Ready suggested that the Lower Elementary classroom teachers create a monthly calendar that directly pertains to the Lower Elementary class. By creating a Lower Elementary calendar that both caregivers and children can reference, the teachers would help maintain high expectations for the children while promoting the ideas of autonomy and accountability (Murray, 2011). Each participant valued the idea that communicated practices and classroom expectations would continue to foster and build independence and responsibility for their children.

Classroom communication can provide another layer of caretaker support for the child and classroom teachers. If caretakers have prior knowledge regarding assignments, class projects, field trips, and special events with the classroom, caretakers can be responsive to the needs of their child and the classroom community. Additional knowledge can decrease the possibility of feeling disconnected from classroom educators and classroom activities within the specific learning environment.

### **Recommendations**

The evident themes that emerged from parent perspectives' directly connected to prior understanding the Montessori philosophy and method, integrating into an established school climate and culture, and sound communication practices that support transitioning families. When families enter into a new school setting that promotes a non-traditional educational model, prior Montessori philosophy and method knowledge can support a proactive transitional process. In addition to prior Montessori knowledge, understanding how the guiding principles unfold within the classroom setting can support the transitional experience. To further support transitional journeys, understanding school culture and climate prior to transitioning can facilitate the sense of belonging and help families begin to build school and classroom connections. Establishing school and classroom connections early in the transitional process can mitigate potential feelings of isolation and lack of transitional support. School-wide and classroom specific communication practices can promote the idea of inclusion and help families gain a better sense of the school and classroom expectations. Not only should communication practices be detailed but communication practices should be done in a timely manner so caretakers can be proactive rather than reactive. Incorporating Montessori knowledge, integration strategies for understanding school climate and culture, sound communication

practices can provide caretakers and children the added support that is often necessary when transitioning into a new learning community.

### **Research Question Three: Transitioning to Montessori – Ideals and Actual Experiences**

*How do families' expectations of the Montessori environment compare with their actual experiences in that environment?*

Each transitional experience was unique and proved to be an individual journey for each participating family. Prior and newly acquired knowledge regarding the Montessori philosophy provided varying transitional experiences for each family. The Ready and the Waiting families did not have prior experience within a Montessori school setting, so expectations regarding school practices or classroom expectations were solely based on their prior experiences within a traditional school setting. Mrs. Alert was a former student with the same Montessori setting so her own personal experiences guided her expectations. Mrs. Alert used her daughter's previous schooling experience within the public school system to help create new expectations that she knew would align with the guiding principles of Montessori education.

### **Autonomous Learning**

All three cases value learning that promotes autonomy and believes in process learning over product driven results. In terms of autonomous learning, all three parents consider the learning process to be unique to the learner and each learner should receive the opportunity to use whatever learning process is most beneficial to him or her. This approach also has given each child the opportunity to take ownership of his own academic goals that align with the developmentally appropriate practices and milestones outlined by Maria Montessori. Each parent agreed that by providing children with the high expectations through different tools and skills, made children more aware of their own learning and classroom needs. Promoting

autonomy within the classroom through classroom assignments and individual work plans allows children to take ownership of their own learning and can begin to hone strategies that support their own academic goals and achievements.

### **Classroom Expectations and Time Management**

Mrs. Ready and Mr. Waiting reported that their children initially had difficulty with classroom expectations and how classwork time was to be used throughout the school day. Both commented that caregiver-teacher-child conferences provided the opportunity for the classroom teachers to share with the caregiver and child more specific expectations. During conferences, each family and classroom teacher created a plan tailored to the needs of the individual child. Mrs. Alert said that her daughters had the prior expectations in mind so transitioning to new classroom expectations did require additional conversations. In addition to conversations, Mrs. Alert commented that her daughters needed additional reassurance from the classroom teachers that they were performing to expectations. All three cases said that additional conversations and child-specific modifications done by classroom teachers solidified the idea that Montessori education promotes the uniqueness of each child and values the whole child, not just the academic abilities of the child. At the beginning of the transitional process, classroom expectations, especially time management strategies should be discussed with transitioning children. To guard against possible time management concerns, classroom teachers and newly transitioned children can work together early in the transitional process so to avoid further concerns that relate directly to time management strategies and completing assignments.

Each parent was asked if their newly found classroom expectations aligned with their prior thoughts and expectations in regarding to Montessori education. Each parent agreed that the Montessori philosophy and method was deeply engrained in the classroom and was visible

during class observations, class assignments, and even personal relationships the children built with classroom peers. Mrs. Ready and Mr. Waiting both mentioned that Montessori-specific vocabulary that directly correlated to classroom materials in the classroom did provide some disconnect initially. Conversations with classroom teachers and demonstrations with Montessori-specific material alleviated this initial disconnect between classroom lessons and activities. Mrs. Alert's prior use of many of the Montessori-specific materials provided a quicker connection to the Montessori concepts and lessons her daughters were performing within the classroom setting. In addition to establishing time management strategies with transitioning children, classroom teachers and classmates can support transitioning children with added attention to Montessori-specific vocabulary and classroom material. Building Montessori-specific vocabulary and understanding the function of different classroom materials is a process; however, the process should begin as soon as the child enters the Montessori community.

In terms of exploring The Eight Guiding Principles of Montessori learning within the classroom, Mrs. Alert readily identified several of the principles and had expectations that each identified principle grounded classroom practices. Mrs. Alert said that the principles did not only apply to the school setting, but could also transfer to support the family household. Bridging both the home and school expectations through the foundational principles that guide Montessori education can further support the ideals of Montessori education and the creation of life-long learners. Mr. Waiting said that as a family they have also bridged school expectations with household expectations and by building the home-school connection they have provided their child with consistent routines and rituals. Mrs. Ready did not elaborate on home-to-school connections and if classroom roles and responsibilities transferred into their home. To further support the idea of home-to-school connections, school personnel can work closely with

caretakers and children to help bridge the possible gap through the discussion of developmentally appropriate practices and activities.

### **Additional Communication Practices**

Mrs. Ready and Mr. Waiting commented that additional communication methods by the classroom teachers would allow newly transiting families to feel a quicker connection to overall Montessori expectations and classroom specific expectations. To expedite the feeling of connectivity to the school setting and more specifically, classroom expectations, both suggested that teachers take a more proactive approach in communicating classroom practices, lessons, and activities that directly relate to the Lower Elementary classroom. Both participants said that early communication, even before the transition occurs could deter confusion and the feeling of unknown during the transitional process. To support the idea of additional communication, orientation and multiple school visits prior to start of the school year or before a child moves to the new environment could help alleviate concerns that might hinder the early stages of the transitional process. Prior transitional planning allows the child and family to become acquainted with the new setting (Giallo et al., 2010). Orientation sessions and school visits can also alleviate the anxieties that are often associated with adjusting to a new physical building, understanding the overall culture and climate of a school, and the policies and procedures that govern the new learning community (Bradshaw et al., 2010). Orientation sessions and school visits can also promote conversations that surround school procedures and policies. Early conversations regarding school procedures and policies can also begin to build a sense of belongingness to transitioning families.

**Recommendations**

The evolving themes that developed from the each parent perspective through the lens of anticipated expectations and actual experiences within the Montessori setting connect to the use of autonomous learning, classroom expectations and time management, and additional communication practices. Entering a new learning environment can be a challenge; however, when communication is effective and school policies and procedures are discussed, the overall transitional process can be fluid. Understanding school policies and procedures is a key element in connecting to school-wide expectations and more specifically, classroom expectations that directly relate to a child's academic goals and accomplishments within the classroom. To further support a child and specific academic goals, communication between school personnel, caregivers, and children is critical. Sound communication practices can aide in the ease of the transitions and can expedite connections to academic goals and classroom expectations. Combining autonomous learning and time management strategies through the use of classroom expectations can create a solid transitional foundation as children integrate into a new learning communication.

## CHAPTER VI

### DISCUSSION

Transitioning from a traditional school setting into a Montessori learning community can promote a level of uncertainty as families strive to understand the overall Montessori philosophy and how classroom expectations align with the Montessori Method. Noel (2011) states that the quality of transitions impacts the academic success of a child, the well-being of the child, and how the family unit feels connected to the new learning environment. To support families in transition, learning systems need to make use of developmentally appropriate practices and milestones. Understanding developmentally appropriate practices and milestones will allow schools to construct solid transitional activities and practices to promote a sense of belongingness and connectivity to the new learning environment. Creating this foundation will begin to ease transitional anxieties that children and families often feel (Bradshaw, Sudhinaraset, Mmari, & Blum, 2010). When learning systems do not recognize the need for transitional practices and activities, transitional experiences of children and families can be effected and hinder assimilation into an unfamiliar school, especially a school that does not follow a familiar schooling philosophy or practice (Yeo & Clarke, 2005).

This chapter will examine how families connected to the Montessori philosophy through prior research and newly acquired knowledge. In addition, this chapter examines how communication practices can support classroom expectations, the promotion of motivating young learners with autonomy all while integrating into a learning community. Subsequently, this chapter affirms and promotes the idea that Montessori educational methods can transcend from the classroom setting to the home environment. Finally, I will discuss limitations of the study, implications for practice, and recommendations for future research.

## **Connecting to the Montessori Philosophy and Method**

Traditional and Montessori learning environments have a common thread that supports the cognitive, social, emotional, and physical development of learners. Research indicates that each setting may have a different underlying philosophy and set of instructional practices (Murray, 2012). Prior to understanding different educational philosophies and instructional practices, one should examine child development concepts (Lash, 2003; Morrison, 2015; Copple & Bredekamp, 2009). Knowledge of “the stages of human development and the developmental milestones of the child will greatly help us understand how learning, in general, occurs (Lash, 2003). Foundational knowledge of human development and developmental milestones can support the investigation of a new educational philosophy and instructional practices that are specific to the new educational concept. In addition to understanding developmental patterns, when an environment is safe and promotes developmentally appropriate activities, children benefit from an increase in self-esteem, complete more self-directed learning goals, and begin to take ownership and responsibility for their academic goals and achievements.

Montessori’s development of sensitive periods of development aligns with the notion that developmental stages and patterns of human growth occur. Not only can caregivers and educators seek to understand age-appropriate stages but direct correlation to optimal periods of development intertwine with the underlying philosophy of the Montessori education. When human developmental stages, milestones, and sensitive periods of growth intertwine in an educational structure, the likelihood to promote natural curiosity, self-confidence, and self-directed learning increases. In addition to promoting natural learning patterns through curiosity and self-directed learning, knowledge grounded in developmental theory and practice can assist caregivers and educator when establishing learning environments. Creating learning

environments that align with sensitive periods of growth and developmental milestones can continue to foster the sense of curiosity and independent learning. Learning environments that do not support sensitive periods of development and developmental milestones could adversely affect a child's learning patterns (Lash, 2003).

To connect even further to the overall knowledge of Montessori philosophy and method, Montessori education is widely known, however, it is not widely understood. Misconceptions involving the Montessori philosophy and classroom practices include the role of the classroom teacher, the use of classroom materials, the structure and layout of the classroom environment, and self-directed learning. These misconceptions can hinder the perception of the Montessori philosophy and the Method that unfolds within the classroom. In order to guard against misconception, Murray (2012) suggests that the Montessori community can “build on the high level of awareness of the Montessori name in the general public” (p. 21). Building a better understanding of the Montessori educational practice can help guard against misconceptions and illustrate the philosophical differences between a Montessori learning environment and a conventional school setting. Clarification of Montessori misconceptions can highlight how the educational practice is guided by child development and critical periods of growth.

### **Communication Practices to Support Classroom Expectations**

Building strong and effective communication practices between educator and caregiver is essential when families transition into an unfamiliar school setting. Communication plays a pivotal role in fostering new relationships, and concise communication can build a solid foundation in building the sense of community between families and the school environment. Susan Graham-Clay (2005) states, “In these changing times, effective partnerships between teachers and parents become even more essential to meet the needs of the children they ‘share’”

(p.117). Active communication between caregivers and educators promotes the idea that each party invests in the well-being of the child and the child's developmental needs and abilities. Solid communication practice can lead to more positive outcomes for children. Effective communication through caregiver-educator interactions can lead to an increase in "academic performance, aid in the development of more positive attitudes towards schooling, and prepare families to engage in effective partnerships across their child's academic career" (Thomas and Dykes, 2013, p.55).

Communication methods between educators and caregivers can vary depending on the situation and the topic of discussion. Written communication is the most "efficient and effective" means of correspondence between home and school (Graham-Clay, 2005, p. 118). The use of written communication is a more permanent record that is often crafted by the teacher with care and relates to very specific content. In this study, all three participants stated that communication between the classroom teachers and the families was fair. The main concern was the lack of attention to sending written communication in a timely manner. Frequently written communication is often done through electronic mail, which participants noted to be convenient; however, the electronic mail was typically sent one or two days prior to the events outlined in the electronic mail content. Mrs. Ready and Mr. Waiting mentioned that this "late notice" made it a challenge to always meet the needs of the event or what was being asked of from the parents. What was even more bothersome to both was when the written piece often needed an action from parents. Both provided a similar example of this situation and explained when field trips occur, electronic mail notifications often request parent drivers and specific school attire for the field trip. Poorly timed communication can hinder caregiver involvement and also the preparedness of the child in the class. Mrs. Alert did not mention particular concerns with communication

practices but her involvement and role in the school setting is much higher than that of Mrs. Alert and Mr. Waiting.

To further build on the importance of communication and classroom expectations, the use of two-way communication is critical. Effective dialogue between caregivers and educators allows for each to build a level of trust, mutual respect, and concern for children and allows each to understand the different perspectives within each conversation. Not only can two-way communication provide information regarding the child in the school setting, but it can also provide information about the child's extra-curricular activities and interests, familial information, or other valuable information that would promote a deeper relationship between the educator and families. All three families in the study shared that the classroom teachers invested in their child or children and had an active role in conversations that were not always school-based. This knowledge promotes the idea that the classroom teacher invests in the whole-child and not just the academic needs of the child. Focusing on the whole-child and families solidifies the idea that effective communication practices build trust and positive relationships.

Informal two-way communication has a significant role in this specific Montessori school setting. Informal dialogue is categorized as brief conversations at drop off or pick up, conversations during unscheduled classroom visits, or during lunch visits from caregivers. Such conversations can be enlightening and can provide caregivers with an added layer of trust and contentment that directly correlated to development stages and progress of their child. When children see constant interactions between the classroom teacher and parents, they can see how the parent-teacher connection that supports home-school collaborations. Subsequently, this visible partnership can facilitate the positive values and high expectations required to meet school expectations as such expectations are held to the same standards within the home.

Connections between home and school supports the awareness that learning is not solely done in a formal setting such as the classroom, but also in the surrounding environment in which the child is an active participant within. All three participants voiced that informal two-way conversations are most prevalent in their interactions with the classroom teachers. Mr. Waiting shared that informal conversations during pick up or drop off allow him to feel more connected to the classroom expectations and how his child is meeting the set expectations. Mrs. Ready's involvement in the school during the lunch hour also allows her to do "quick check-ins" with the classroom teachers to ensure the needs of the teachers and her children are met.

The use of conferences in the Montessori school setting played a key role for the child through the different modalities of communication. In some school environments, parent-teacher conferences do not involve the child. However, in the study site, children facilitated conferences and the teacher assisted the child through the dialogue if support was needed. The role of the child is superior to the role of the teacher or caregiver in the conference setting. When a child facilitates his own conference, the child demonstrates ownership of his academic goals and progress. Subsequently, the child can also discuss the needs of improvement or extra attention for a given skill or expectation. Mrs. Alert shared that conferences demonstrate how classroom expectations transcend into the varying degrees of expectations that directly correlates to the progress within a given skill or task. Within each conference, each child discussed his educational goals for a set time period and explained how they reached or are still working to reach their set goals. Such conversations allowed students to understand and connect deeper to process over product learning which is grounded in Montessori theory.

### **Building Motivated Learners through Autonomy**

An underlying principle that guides Montessori education is autonomy. The use of autonomy in a Montessori classroom can build confidence in children, maintain a level of curiosity that furthers the learning process, and allows children to feel a sense of ownership within the learning community. Motivation is also a fundamental element that supports autonomy in learning. Motivation is a “vital determinant of academic performance and achievement” and is categorized by the classification terms intrinsic or extrinsic (Maurer, Allen, Gatch, Shankar & Sturges, 2013, p.77). The use of intrinsic motivation focuses on the self-enjoyment and accomplishing tasks for self-fulfillment. Extrinsic motivation is the idea that the task or activity is completed to receive an external reward or to avoid a penalty. The Montessori philosophy firmly supports children should perform activities and learning guided by intrinsic motivation rather than extrinsic motivation. Through the use of varied classroom materials and classroom expectations, Montessori school settings focus intrinsic motivation factors versus the use of rewards and punishments often connected to extrinsic motivation. Intrinsic motivation and autonomous learning can be a predictor of positive academic performance, higher school attendance rates, increase academic progress, and support perseverance when working toward academic or social development goals (Maurer et al., 2013).

When analyzing each case study, each participant shared that once their child became aware that the Montessori classroom was established under intrinsic motivation factors versus extrinsic motivations such as grades or a ranking system, the child’s overall interest in academic lessons and activities increased. Both Mrs. Ready and Mrs. Alert’s children knew from the public school setting that grades and ranking were the motivating factors within their previous school setting. These external factors truly had an impact on each of their children and how each

child viewed herself as a learner. External motivations hindered Ginny with completing her daily work assignments. Mrs. Ready stated that “All too often Ginny’s teacher punished her with limited to no recess time due to incomplete class work.” By using the removal of recess as a punishment, Ginny began to expect that every day she would not have recess time, which led to an even lesser level of motivation. Mrs. Alert said that when her daughters entered the Montessori classroom they were unsure of the new method of learning that promoted a more intrinsic approach to learning. In terms of grades and the report cards, Mr. Waiting commented that his son was not aware of the grading system that was at his previous school and the discussion of grades and ranking did not take place in their home. Mrs. Ready and Mrs. Alert had contrasting experiences with grades and rankings with their daughters in a conventional school setting. Both argued that assigning grades and numbers to their children made their children feel undervalued and their significance in the classroom community correlated to a number or a teacher given qualifier.

To further solidify the idea that the Montessori Method promotes intrinsic motivation and autonomous learning, the use of self-directed learning is a foundation within the classroom. Self-directed learning allows students to take ownership in their learning. In addition to gaining a sense of ownership in self-directed learning, students can become more motivated to fully engage in the learning process. In a Montessori setting, proper planning strategies established by the teacher and children support the idea of self-directed learning. Planning and work selection should not be solely based on the recommendation of the teacher, but rather a collaborative effort of both the teacher and the child. Proper planning strategies enhance self-directed learning and allow children to demonstrate their autonomous role in the learning community. Developing and organizing assignments provides the child the opportunity to plan creative and preferred

activities that reinforce required developmental skills (Platz, 1994). Creative thought through the use of planning can prevent classroom lessons and activities from becoming mundane and repetitive which align with promoting motivating and autonomous learning.

When transitioning from the traditional school environment into the Montessori learning community, each family said that each of their children initially struggled with two elements that related to self-directed learning: weekly planning and time management with large amounts of work time. Mrs. Ready and Mr. Alert said that during the first six weeks of the school year, the classroom teachers commented that their children spent a great deal of time off task and wandering around the classroom and not engaged in their planned work. In order to help the children overcome this initial obstacle, Mr. Waiting commented that the classroom teachers provided more guidance on weekly planning and time management skills. Mrs. Alert was not overly concerned with her daughters understanding the weekly planning or the aspect of managing their own classroom time, but rather she was concerned with the idea that her daughters were more reserved in choosing their own work to complete. The idea that children can be their own facilitators rather than the teacher-directed work plans proved to be an adjustment for Mrs. Alert's daughters. Mrs. Alert's shared that her daughters were also hesitant to move to another piece of work when they completed an assignment. This hesitancy directly connected to the idea that in their experience a traditional classroom, the class progresses through the curriculum as a whole class versus progressing through curriculum units that fit the individual needs of each child.

### **Interconnections of the Learning Community**

In a Montessori-based classroom setting, the idea that the classroom is an active learning community is demonstrated when educators, caregivers, and children work in unison to support

the developmental progress of the children in the classroom. In order for educators, caregivers, and children to feel secure in the learning community, school should “feel safe to engage intellectually, socially, and emotionally in the act of learning” (Jones, 2012). To further promote this idea, learning communities need to take responsibility in providing knowledgeable teachers who promote a classroom climate and culture where all students have an active voice and can have an interdependent relationship where each can learn from one another. Cultivating this interdependent relationship within the classroom through curricula that is thought-provoking and engaging can promote student engagement and provide a sense of empowerment in the classroom. The role of the teacher in a Montessori classroom plays a pivotal role in establishing a classroom environment that recognizes and values students’ thoughts, beliefs, and questions. Establishing a safe learning environment where each student feels valued, teachers can encourage students to work together in a cooperative manner. A supportive learning environment can push students to understand differing beliefs and feeling and “learn to work with others in a constructive way” (Jones, 2012).

In order to create an integrated learning community, teachers and students must create a classroom where both the teacher and the student feel engaged. Proper engagement in a Montessori classroom should focus on student-directed learning that promotes curiosity and the exploration of one’s own learning needs and desires. The process of student-directed learning will require the classroom teacher to initially facilitate lessons and activities that promote the idea that everyone in the class plays an active role in the classroom environment. Cultivating the feeling of community within a classroom requires classroom teachers to dedicate time at the beginning of the school year. During initial class conversations about the interconnected classroom environment, some students may be hesitant to build or even shy away from the idea

of building a classroom community (Jones, 2012). To lessen hesitancy and to begin to build a connected classroom community, teachers must reiterate that each student has a voice and feelings that make them a valued member of the classroom community. Teachers also need to model effective classroom practices that align with the ideals of creating a caring, trust-based learning environment (McCormick, 2008).

Through the discussion that focused on interconnected learning communities, each participant provided examples of how interconnections are evident in the Montessori classroom. Mrs. Ready commented that her daughter's leadership ability increased due to the idea of mentoring other peers in the classroom setting. Mrs. Ready continued to share that the mentorship role not only taught her daughter how to help those in need, but it also provided her daughter with some self-regulation skills. Oftentimes Ginny would assist peers without seeking their permission, which would result in Ginny's feelings getting hurt. Through different opportunities in peer mentoring, Ginny learned relationship roles and how to interact with peers if they needed assistance. Mr. Waiting provided a similar response regarding mentorship and the role his son facilitates in the classroom setting. Mr. Waiting said that seeing his son as an active participant with other peers has been a welcoming benefit of the classroom community. Mr. Waiting did comment that now that his son is comfortable in the learning community, his son has had some issues with being mindful of when others are working and not disrupting their work habits. This realization has provided Luke the opportunity to be more respectful of his interactions with peers during set work time and has allowed Luke to see how his actions can directly impact others work. Mrs. Alert said that the safe, caring classroom has allowed her daughters to take risks in their own learning without the fear of not following a set curricula guideline or teachers bestowing punishments for not following a concise learning pattern. This

freedom in learning builds on the trust children create with their teachers and their classmates. Fostering relationships with the integrated learning environment allows students to recognize their own abilities and their role within the classroom. A collaborative classroom allows students to interact with peers and constructive socialization practices that support each child and the overall interactions within the classroom community. In addition to fostering socialization practices within the classroom, students who have positive communication experiences and interactions with their teachers readily communicate their individualized needs and learning desires. This level of communication within the classroom community furthers the idea that Montessori-based classrooms promote the ideal that students should maintain a level of ownership within the classroom community and their own learning goals.

### **Promoting the Montessori Mindset in the Home**

The Eight Guiding Principles of Montessori and the overarching Montessori philosophy that facilitates Montessori-based educational settings are applicable outside the school setting. Bridging school expectations with roles and duties within the home can further solidify the idea that Montessori beliefs and values are appropriate even in different settings. Furthermore, Montessori values such as “respect for work, respect for feelings, care of self, and care for the environment” such values can transfer to the home settings (Rosanova, 2003, p.8). The transfer of school and classrooms values can promote the Montessori philosophy as a way of life rather than just principles valued in one setting.

Making clear connections between the school and home encourages children to plan an integral role in bridging these two environments. Children need to be aware that their roles and actions connect to a larger concept, such as their home. Montessori-based developmental practices not only support the child in his academic endeavors, but also promotes that idea that

preparation of life skills is critical to support life-long learning. Caregivers play a pivotal role in establishing the connection between the school setting and the home environment. Caregivers who take an active part in their child's school tend to nurture and develop similar expectations within the home. Subsequently, in order to develop similar expectations between home and school environments, the school needs to inform and encourage caregiver involvement within the school setting. Caregiver involvement allows caregivers to fully understand what expectations can transfer from the school setting to the home environment (Sad & Gürbüzürk, 2013).

In addition to promoting the same academic goals and objectives, children learning in a Montessori environment play non-academic roles in the classroom community. Life-long skills such as washing classroom dishes, sweeping the classroom floor, dusting and disinfecting the classroom shelves and materials, cleaning classroom tables, feeding classroom pets, and meal preparation are skills typically taught in a Montessori setting. Not only do these non-academic classroom skills support the overall idea of a classroom community, but these skills can directly transfer to the home setting. Transferring such skills not only solidifies the idea that skills learned within the classroom, but also are applicable in the child's home. Caregivers must understand the different nonacademic skills taught within Montessori classrooms and how to utilize each skill outside the classroom and to support the idea that Montessori education creates lifelong learners with varied academic and life skills.

Mrs. Ready and Mrs. Alert commented that they understood the value of building life skills into the Montessori curriculum. Both said that the different skills such as cleaning tables and sweeping floors have transferred into home expectations. In addition, each said that the life-skills taught in the Montessori curricula appealed to them both when they were researching the Montessori philosophy and Method. Mrs. Alert said that she holds her children to the same

classroom expectations when it comes to caring for and keeping an environment clean and tidy. Mrs. Alert's children perform the same life-skills tasks within the home that classroom teachers expect of them in the classroom setting. Mrs. Alert said that this level of expectation prevents her children from experiencing conflicting expectations in different settings. Mrs. Ready did not discuss specific life-skills taught within the classroom, but rather discussed the idea that she likes how classroom expectations such as sweeping or cleaning tables can provide the same level of expectation within the home. Mr. Waiting did not comment on how life skills taught within the classroom has fostered a new sense of responsibility within their familial home. Different levels of support and the use of life-skills varies between each participant and their own expectations with their own child. This variance is not a hindrance within the classroom as long as the classroom teacher models and emulates the life-skills each child performs in the classroom to support the classroom community.

### **Conclusions**

Findings from this study continue to align with the research community regarding best practices when children and families transition in to a new learning environment (Hanewald, 2013; Monkevicienė, Mishara, & Dufour, 2006; Roybal, Thornton, & Usinger, 2014).

Understanding the benefits of sound transitional practices supports families as they assimilate into a new school environment. In this study, research revealed that understanding the Montessori philosophy and The Eight Guiding Principles of Montessori Education along with evidence-based best practices allowed families to integrate more quickly into the new school setting.

Family focus group interviews and reflective written pieces revealed similar themes in direct connection to understanding Montessori education and Montessori expectations within a

classroom setting. In addition to participants' overall understanding of the Montessori philosophy and Method with the school setting, participants commented on school communication practices, classroom expectations, and building home expectations to align with school expectations.

Each participant's level of Montessori knowledge varied prior to enrolling in the Montessori school setting. However, even with varying degrees of knowledge, each participant felt that over the course of their transition into the Montessori setting, their level of the knowledge increased and could speak to different elements of Montessori education and classroom practices. This increase in knowledge provided all three families with a sense of belonging to the school and, more specifically, to the Lower Elementary classroom.

Participant concerns largely focused on the lack of classroom communication by classroom teachers. Lack of communication by classroom teachers can provide a layer of disconnect for newly transitioning families. Limited or poorly timed communication can hinder the transitional process and promote an increase in anxiety, a decrease in motivation to perform academically, and the creation of negative attitudes toward the school setting (Roybal, Thornton, & Usinger, 2014). Mrs. Ready and Mr. Waiting both agreed that increasing teacher communication would decrease potential feelings of the unknown and would allow caregivers to take a more active role in classroom activities.

Building a connection between classroom expectations and home expectations further promotes the idea that learning occurs not solely within the confines of a school building. Mrs. Alert said that within her household, all three of her children have roles and responsibilities that align with Montessori classroom roles and responsibilities. The idea that each environment is interconnected has allowed Mrs. Alert to maintain consistent expectations for her children. Mr.

Waiting commented that his family is still working on bridging school-home connects, but he can see the value in establishing consistent expectations in both environments.

When the school adds better communication practices to the Montessori philosophy, classroom expectations, and home-school connections, it can improve families' transition from a traditional school setting to a Montessori learning environment.

### **Implications for Practice**

The research revealed implications that could hinder successful transition experiences of families as they move from a conventional school setting to a Montessori learning community. Implications identified in this study include the following: a lack of knowledge among caregivers of the overall Montessori philosophy that could hinder how classroom practices that could negatively influence their views on classroom practices; a lack of classroom expectations among caregivers that could deter the proper use of Montessori-specific material; and limited communication that directly conveys information to caregivers about classroom activities and lessons.

All three families reported an overall positive experience regarding their own transitional journey into the Montessori learning community. They reported many beneficial practices that supported their decision to move to the Montessori learning environment from a traditional school setting. All three families said it is critical for parents to perform research that provides an overview of the Montessori philosophy and classroom expectation. Lack of research and a true understanding of Montessori practices can skew the perception of the Montessori education system. Caregivers' failure to research and gain knowledge about the Montessori program can lead to misjudgments and promote misconceptions.

Prior research on Montessori-specific classroom materials and vocabulary could allow caregivers to more readily support their child as their child manipulates the classroom material to accomplish academic goals. Understanding the specific function of each Montessori-specific manipulative could potentially increase conversations between the caregiver and the child regarding classroom practices. In addition to understanding the functions of classroom material, knowledge of Montessori-specific vocabulary could support caregivers as they converse with their child about classroom lessons and activities. By learning Montessori-specific material and vocabulary, caregivers can also have more fluid conversations with classroom teachers. Creating this level of knowledge can support the idea of an integrated classroom that consists of caregivers, teachers, and children.

Lastly, the lack of classroom-specific communication can create a level of disconnect between classroom teachers and caregivers. All three families reported some degree of poor communication that directly related to the Lower Elementary classroom. Each family commented that the weekly, school-wide newsletter provided a good overview of school-wide programming and events. In order to increase classroom specific communication, the school could use a weekly or monthly calendar or newsletter would alleviate caregiver frustration when caregiver participation is necessary or requested by classroom teachers. The use of a weekly or monthly calendar or newsletter would further develop the idea that caregivers play in integral role with the classroom.

Examining implications through the lens of a school administrator could be beneficial to transitioning families and the overall learning community. Implications of leadership roles within this specific Montessori school setting include the following: building connections with new families to the Montessori philosophy and method, creating communication practices that

support classroom experiences, supporting motivated learners through autonomous activities and lessons, interconnecting different learning communities within the school setting, and lastly, promoting the Montessori mindset within the home.

In order to continue to build on the Montessori philosophy and method among families, leaders within the Montessori learning community can provide educational seminars or workshops that specifically relate to new families the guiding principles of the Montessori philosophy and the method. Montessori specific seminars and workshops can provide families with additional, directly relevant knowledge about Montessori school settings. Providing families with additional knowledge can support them through the transitional process. In addition to giving families new information, seminars and workshops can facilitate additional areas of focus that the school administration can use to further develop subsequent seminars and workshops.

Communication is critical during periods of transition and the use of communication can support families through their transitional process. In order for families to feel connected and understand school and classroom expectations regarding the new learning environment, communication practices should be held to high regard by the school leadership. School-wide communication can outline events, activities, and overall school expectations. Such communication should occur frequently and through an accessible format. Classroom specific communication should occur on a regular basis and in a format that fits that needs of the families with children in specific classroom. To ensure that classroom educators perform classroom specific communication practices on a regular basis and within a timely manner, classroom teachers can provide classroom specific information for the school-wide communication system

established by the school administrator. This practice allows families and school personnel to have the most current information regarding school activities and expectations.

By supporting motivated learners through autonomous activities and lessons, the administration allows the Montessori Method to properly unfold with the learning community and more specifically, the classroom setting. The school administrator can support classroom teachers through planning additional activities and lessons that align with the Montessori philosophy and method while supporting the individual needs of each student in the school community. Cooperative planning can facilitate enrichment activities, community-based learning, and show families that the school administration invests in the activities, lessons, and enrichment practices that best suits the learning community.

A school administrator needs to understand how different learning communities interact within a school setting. Creating a school setting where different ages and levels of learning interact not only supports the underlying guiding Montessori philosophy, but it allows facilitates interactions between different families, students, and school personnel among the different levels with the school setting. Through the transitional process, a school administrator can use these multiple levels of support to help families connect to the Montessori learning community. Cultivating a feeling of connection can provide families who have recently transitioned with the opportunity to become a stakeholder within the new school setting. Interconnecting the varied levels of learning can also promote a sense of unity among established and newly transitioned families within the learning environment.

Promoting the Montessori mindset within the home can support the classroom expectations established in classroom communities. Home-to-school connections can ensure that families have a true understanding of the Montessori philosophy and method and how the

guiding principles can unfold in different environments. To foster a home-to-school connection, the school administration can provide insight into how Montessori principles might appear within a home setting. Providing concrete examples such as how to restore an environment or materials after one is finished using an item would support both classroom practices and possible home expectations that focus on order and routine. Communication practices outlined by the school administrator can support conversations and actions that align with the Montessori philosophy, method and guiding principles.

### **Recommendations for Future Research**

The goal of this study was to examine the transitional experiences of families as they moved from a traditional school setting to a Montessori learning community. Transitioning into a new learning environment can greatly impact the overall well-being and academic success of a child. Poorly guided transitions can diminish a child's self-esteem, hinder academic goals, and cause a sense of disconnect from the new school setting. Participant involvement highlighted several themes that support the idea that good transitions matter.

Further research could include the use of more study sites. By using only one site, I needed data and findings that, though specific, might not be generalizable in a larger setting. Increasing the number of study sites could allow for deeper triangulation of data to support the generalizability. In addition to increasing study sites, a larger participant sample could generate additional emergent themes and a richer, more in-depth cross-case analysis. Increasing the participatory sampling would support the idea of generalizability.

Another aspect to consider would be the age range of the children who are transitioning into the Montessori setting. For this study, children in first through third grade participated, but by increasing the age range of children, that may provide additional information on how older

children transition into a Montessori setting after being in a traditional school setting for a longer period of time. This aspect may provide different transitional concerns than the concerns shared in this study.

The research community lacks current research on transitional experiences from a traditional school setting to a Montessori learning community so this research could support Montessori school administrators and educators help children and families during transitional periods that directly related to entering into a Montessori learning community. Subsequently, a large research gap was noticed in the fact that no study has focused on the transitional experiences when children and families transition out of a Montessori school setting and into a traditional school setting. By filling this research gap, both spectra of transition would be researched and could support the needs of families and learning communities.

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**APPENDIX A****INTERVIEW PROTOCOL FOR ADMINISTRATION**

1. How long have you been an administrator at this school?
2. What percentage of families would you say start school here with an understanding of the Montessori philosophy? What percentage of families transition from a conventional school setting into the Montessori learning community?
3. As the school administrator, how do you help families and children who are not familiar with a Montessori philosophy transition into the school?
4. When families transition into the new learning environment, in your opinion, who do you think transitions more smoothly, parents or children? Do you see a difference in how children and adults make this transition?
5. Can you describe how you work with families and children during this transition to fully understand the school and classroom expectations that are grounded in the Montessori Method?
6. In your opinion, when a child transitions from a more traditional learning environment to a Montessori learning community, what are the areas that you notice where the child has difficulty in the transition? When you notice possible hindrances, as the school administrator, how do you typically respond? Can you give an example?
7. How do you orient and familiarize newly enrolled families that do not have a comprehensive understanding of the Montessori philosophy? Are parents receptive to learning how work plans, portfolios, and classroom materials work to support the Montessori Method?
8. When you provide Parent Education Nights, who mainly attends the sessions? New families, existing families, or both? When developing Parent Education Nights, how do you select topics? Do topics develop from parent concerns, new family questions, etc.?

9. If a classroom teacher notices a child is not transitioning well, how do you, as an administrator, typically respond? At what point do you involve the child's parents?
  
10. If you have to address transitional concerns with parents, what concerns are commonly addressed regarding how their child is transitioning into the school?
  
11. What role does the school community play during periods of transition?

## APPENDIX B

### INTERVIEW PROTOCOL FOR EDUCATORS

1. As a classroom teacher, how do you help children who are not familiar with a Montessori classroom transition into the classroom?

Possible Follow-Up Questions:

Do you focus attention on the overall Montessori philosophy or mostly on classroom expectations?

Or do you have another area of focus?

2. When families transition into the new method of learning, in your opinion, who do you think transitions more smoothly? Children or Adults?
3. Can you describe how you work with the child/family so the child can be comfortable and confident during this transition and learn the classroom expectations that are grounded in the Montessori Method?
4. When a child transitions from a more traditional learning environment to a Montessori learning community, what are a few areas that you notice where the child has difficulty in the transition? When you notice possible hindrances, as a teacher, what do you do to help in the overall transition process?
5. How do you orient and familiarize newly transitioned children when it comes to Montessori materials and verbiage? Are children receptive to learning how work plans, portfolios, and classroom materials work support their overall learning?
6. How do you orient parents with work plans, portfolios, and classroom materials? If parents have misunderstandings, do they typically come to you for clarification or does their child demonstrate how the materials support classroom expectations and learning goals?

7. If a child transitions into the class and you notice that transitioning is not going well, how do you typically respond? Can you give an example? Do you involve the parents initially or do you try to work with the child prior to parent involvement?
8. Have you ever had to communicate to the school administration and/or parents that a child is having difficulty in the transition and/or with classroom expectations? Please explain.
9. In your opinion, how long does it take a typical child to become fully engaged and immersed in the Montessori Method?
10. Do you discuss with parents how classroom work expectations can transcend to home expectations?
11. When watching students interact with each other, do existing students tend to help newly transitioned students? In what ways does your curriculum foster this type of student-to-student support? Can you give an example?
12. Furthermore, how do you create a learning environment that feels safe for new students to seek support from existing students?

## APPENDIX C

### INTERVIEW PROTOCOL FOR FAMILY FOCUS GROUPS

1. Please describe your child's school setting before coming to the Montessori school. Can you tell me a little about your child and what prompted your family to leave a more traditional school setting and transition into a Montessori-based learning environment?
2. Were there things that were not working well for your family in your previous school setting?
3. Were there any areas in your previous school setting that you found positive?
4. What did you expect about Montessori that would be different? What led you to expect that?
5. How familiar were you with the Montessori Method of instruction before your child started attending here? How did you decide to enroll your child in this Montessori school? (Did you do research, did you ask others for recommendations, etc.)
6. When your child first entered the mix-age classroom, what initial concerns did you have?

Possible Follow-Up Questions:

How did you voice your concerns?

And if you voiced your concerns, were the teachers receptive to your needs and concerns?

7. Now, that your child has been attending the school, do you feel like your own expectations were met and accurately depicted within the Montessori classroom?
8. How did your child adapt to the new classroom environment and Montessori's specific language? What did the first few weeks of the school year look like for you and your child?

9. Do you feel confident in understanding different lessons that your child may describe when using Montessori based classroom materials? If not, do you feel comfortable asking your child or a teacher to demonstrate how the materials are used during work time?
10. As your child transitioned into the new learning environment, did he or she voice any concerns to you? And if so, can you elaborate on their concerns and how you addressed their concerns.
11. Can you describe a few areas in which you have been surprised (both positive and negative) with the transition? Did the transition go smoothly or were there a few learning curves that had to be navigated?
12. From your perspective, how has the school administration supported your transition? Has the administration been receptive to your concerns? If so, how? If not, can you explain how your needs were not met?
13. How have the teachers communicated classroom and work expectations this first year? Do you feel as if you have a clear understanding of how the Montessori Method unfolds in the classroom so you can support your child's learning? Do you have any concerns with classroom procedures or work expectations? If so, how have you addressed these concerns and have they been given proper attention?
14. In what areas would you like additional information regarding instructional practices or classroom work expectations? For example, Montessori language used such as "work" or "golden beads."
15. Do you have any overall suggestions or comments that you think would help families transition from a more traditional school setting to a Montessori learning community now that you have made the transition yourself?

**APPENDIX D:**

**CLASSROOM AND PLAYGROUND OBSERVATIONS FORM**

Name of Observer: \_\_\_\_\_ Date: \_\_\_\_\_ AM/PM  
Class Observed: \_\_\_\_\_ Number of Teachers: \_\_\_\_\_ Number of Students: \_\_\_\_\_

Comment on how you observed the following learner outcomes promoted with the classroom

Independence

(Ability to care for one's self and the environment - explore the concepts)

Confidence and Competence

(Communicate one's own thoughts, ideas and feeling – demonstrate a clear sense of purpose)

Autonomy

(Use multiple strategies to solve problems – display equanimity)

Intrinsic Motivation

(Display a strong work ethic)

Social Responsibility

(Work and play together with cooperation, democratic living and learning by practicing good manners)

Academic Preparation

Develop a sense of self-worth by experiencing successful learning)

Spiritual Awareness

(Caring, compassionate and open to others' feelings, empathy)

Global Citizenship

(Understand that when necessary rules and limits are followed there is freedom)

Assimilation

(Do any children look confused, perplexed during learning/transitions)