Making Sense of Montessori Teacher Identity, Montessori Pedagogy, and Educational Policies in Public Schools

Heather E. Gerker, University of Cincinnati

Keywords: *education policy, public schools, Montessori, Montessori fidelity*

Abstract: Montessori teachers in public schools navigate a system daily that often does not align with their pedagogy, and district policies push them to stray from high-fidelity implementation. Using Weick's sensemaking theory and literature on Montessori teacher identity, I contend that Montessori teachers' identity plays a crucial role in how, or if, they respond to educational policies that may not seemingly align with the Montessori Method. The overarching purpose of this study was to understand Montessori public school teachers' experiences with policies that influence their pedagogy. Through qualitative interviews and a culminating group-level assessment session, three themes emerged as teachers shared their experiences with educational policies: (a) Montessori pedagogy is more than the materials, (b) districts often force district-wide requirements that are at odds with the Montessori pedagogy, and (c) Montessori teachers in public schools do not feel supported. This article concludes with a discussion of how to better support Montessori teachers in public school settings based on the study's findings.

Montessori public school teachers often teach in educational systems radically different from Montessori pedagogy. Public schools are subject to mandated policy requirements with which Montessori pedagogy does not naturally align. Although a wealth of research shows that Montessori education improves student outcomes, its success depends on the fidelity of implementation (Culclasure et al., 2018; Lillard, 2012; Lillard et al., 2017). Consequently, Montessori teachers daily traverse a system that often does not align with their pedagogy, and education policies may push their pedagogy to stray from high-fidelity implementation (Block, 2015).

Policies shape teachers' daily work—whether they realize it or not—often creating challenges rather than supporting them while teaching (Perryman et al., 2017). In a 2015 study examining a public Montessori school's response to accountability, one teacher commented, "We compromise what we believe in. We compromise what we teach" (Block, 2015, p. 51). At the same time, shifting pedagogies because of policies is not a unique concern for Montessori public school teachers. Many teachers from different pedagogical backgrounds experience the tension between policy and practice. For example, Ellison et al. (2018) sought to understand how teachers' daily practice

informs their perspective on education policy. A problem that emerged from their study was bad policy, which they claimed focused on improving student outcomes but took away the educator's ability to individualize teaching (Ellison et al., 2018). Further, because of the pressure to raise student test scores and keep them up, public school teachers "devote large amounts of classroom time to test preparation activities" (Abrams et al., 2003, p. 18) and are shaping their curriculum to match standardized tests (Au, 2011). Therefore, the policies that mandate standardized tests are pushing the focus away from what is known as best practice in child-centered education, which results in a more teacher-centered pedagogy (Au, 2011).

Instead of individualizing teaching, teachers are teaching to the test and narrowing curriculum (Abrams et al., 2003; Au, 2011; Berliner, 2011; Levatino et al., 2023). Au (2011) described several studies that show how high-stakes testing narrows the instructional curriculum. For example, in a nationwide study by the Center for Educational Policy in 2006 (as cited in Au, 2011), 71% of districts reported eliminating at least one subject to spend more time on reading and math in response to the high-stakes testing mandated under the No Child Left Behind legislation.

Federal and state regulations, such as high-stakes testing mandates, are also the most salient challenges currently identified for Montessori public school teachers (Block, 2015; Valli & Buese, 2007; Williamson et al., 2005). Montessori teachers assess students primarily through observation, so standardized testing is not part of Montessori pedagogy. Thus, a well-documented challenge for public Montessori teachers is integrating required standardized tests into the Montessori Method (Block, 2015; Borgman, 2021). In addition to federal and state mandates, significant issues challenging Montessori public school teachers include finding and retaining teachers, budget cuts, and district support (Murray & Peyton, 2008).

Despite these challenges, principals in a 2008 study reported "being reasonably successful at living up to the ideals of establishing truly Montessori environments within public schools" (Murray & Peyton, 2008, p. 30). Further, landmark studies from Lillard and Else-Quest (2006) and Lillard et al. (2017) found that Montessori students scored better on standardized assessments in reading and math, which supports the findings from Dohrmann et al. (2007) that equal or better outcomes are possible when Montessori pedagogy is implemented with high fidelity. Indeed, in a study examining child-centered pedagogies in general, Williamson et al. (2005) found that teachers "do not have to sacrifice high-quality, child-centered pedagogy" (p. 194) to manage the challenging requirements of high-stakes testing.

Although currently there is not one decided tool to measure fidelity in Montessori classrooms, Lillard and Heise (2016) examined the Montessori materials as an index of fidelity. To do so, they compared the use of only Montessori materials versus including supplemental materials in Early Childhood Montessori classrooms. In their study, they found a significant increase occurred in early reading and executive function in children in Montessori classrooms in which supplemental materials were removed. The children advanced slightly more in early math than in the classrooms where supplemental materials remained. Studies from Dohrmann et al. (2007) and Lillard and Else-Quest (2006) showed that a high-fidelity Montessori approach can effectively fulfill test-based accountability demands. It is unclear, though, how Montessori teachers manage policy challenges while implementing high-fidelity Montessori pedagogy. The guiding questions in this study went beyond whether Montessori pedagogy can be effective in public schools and sought to understand the space between policy and implementation (Perryman et al., 2017). In other words, how do Montessori teachers see themselves and their pedagogy regarding policy?

I used several aspects of my experiences in the field of Montessori education to understand how teachers see themselves and their pedagogy regarding education policy. As a parent of three students who attend public Montessori schools, I have experienced several shifts in pedagogy; at the same time, my children have been in public Montessori classrooms where the pedagogy is implemented with fidelity. As a credentialed Montessori teacher invested in the fidelity of Montessori education in public schools, I volunteered to serve on decision-making committees at our local school district. As a doctoral student of education policy, I am curious to learn how a Montessori teacher interprets policy and engages in advocacy. With these experiences in mind, I conducted a phenomenological interview study culminating with a participatory group method known as *group-level assessment* (Vaughn & Lohmueller, 2014). I intentionally designed broad policy- and pedagogy-related research questions because I viewed this study as a pilot for future research. The two research questions were as follows. How, if at all, does public Montessori teachers' pedagogy shift because of education policies? How do public

Montessori teachers perceive their capacity to engage in policies as the policies relate to the Montessori pedagogy?

In this article, I provide context for the many ways Montessori education may be defined. Then, I explain how the extant literature on teacher responses to policy and Montessori teacher identity gave rise to and justify the study's importance. Because a key aspect of the research explored how Montessori teachers navigate the public-school-policy landscape and reconcile it with their Montessori teacher identities, I used sensemaking theory (Weick, 1995) as the lens through which to interpret the data. I contend that a Montessori teacher's identity plays a crucial role in how, or if, they respond to educational policies that may not seemingly align with the Montessori Method and conclude this article with a discussion of ways to better support Montessori teachers in public school settings.

Inconsistencies in Defining Montessori Education

Implementing Montessori education with fidelity requires consistent practices, regardless of whether it is implemented in private or public schools or not. A Montessori learning environment includes core components: "concepts of freedom, structure, and order, reality and nature, beauty and atmosphere, the Montessori materials, and the development of community life" (Lillard, 1972, p. 51). Differing from other teaching pedagogies, the Montessori teacher's role is to connect the aforementioned core components of the classroom, prepare the environment, and guide student learning. Teachers conduct observations and use their findings to individualize student lessons and alter the environment. Maria Montessori (1995) noted the teacher "must have a kind of faith that the child will reveal himself through work" (p. 276). That is, a Montessori teacher must trust that students will learn and develop in an environment that has been carefully prepared for them.

Montessori Public Policy Initiative, a collaborative project of Association Montessori Internationale/USA (AMI/USA) and the American Montessori Society (AMS), developed guidelines that reflect authentic implementation of Montessori education (Montessori Public Policy Initiative [MPPI], 2015). The guidelines include describing Montessori environments grouped in multigrade levels in classroom communities: preschool to kindergarten (3 to 6 years old), first to third grade, fourth to sixth grade, and so on. Multigrade-level grouping allows peer teaching and modeling while teachers work one-on-one or with small groups of students. In addition, the guidelines refer to a "full complement of Montessori materials" as a requirement for authentic implementation (MPPI, 2015, p. 1). The Montessori materials are designed to provide many of the core components while focusing on a whole-child developmental approach (Montessori, 1964). The materials are hands-on, moving from concrete to abstract, which allows independent student learning. As Block (2015) explained, "the Montessori curriculum is interconnected, cross-disciplinary, hands-on, and experiential" (p. 44).

Although defining Montessori education may seem straightforward, a scholarly literature review shows some inconsistencies. For example, Lillard and Else-Quest (2006) defined authentic Montessori programs as those recognized by AMI/USA, whereas Begin (2014) established Montessori programs as those that meet at least 75% of the criteria listed in guidelines, once known as the Essential Elements of Successful Montessori Schools in the Public Sector, set forth by AMS, Montessori Educational Programs International, the North American Montessori Teachers' Association, the Southwest Montessori Training Center, and AMI/USA. Other studies described critical elements of the pedagogy in their definitions, such as 3-year age spans and multiple age groupings in classrooms, teachers who are trained in Montessori education, and a prepared environment where children can move freely, selecting work and returning materials to shelves when finished (Block, 2015; Dohrmann et al., 2007; Lillard & Else-Quest, 2006; Whitescarver & Cossentino, 2008). Some of these elements are identified in the AMI guidelines (Lillard & Else-Quest, 2006) and the Essential Elements of Successful Montessori Schools in the Public Sector (Begin, 2014), yet definitions are not congruent. In addition, Murray and Daoust (2023) noted that although researchers provide evidence of the Montessori environments they study, as previously described, there is not a widely accepted tool for assessing the fidelity of Montessori education. Further, there is no one governing body that enforces the quality of all Montessori education in the United States or that ensures that the Montessori curriculum is followed in schools. Without copyright on the definition of Montessori education, any school can claim to use the Montessori Method (Debs et al., 2022; Whitescarver & Cossentino, 2008).

Debs et al. (2022) examined the inconsistencies of how the Montessori Method is defined by scholars and Montessori organizations. They noted that Montessori organizations around the world hold "varying degrees of adherence to Montessori's original ideas" (p. 2). Educators have different pedagogical preferences situated

in different geographical and cultural contexts that add to the complexities of a common definition (Debs et al., 2022).

Literature Review

Teacher identity plays an important role in how a teacher interprets education policy. Therefore, I include previous literature on Montessori teacher identity and teacher response to education policy in this review of the literature.

Teacher Identity

Although the extant literature on professional teacher identity is expansive, defining teacher identity is challenging (Akkerman & Meijer, 2011; Beauchamp & Thomas, 2009). However, many scholars agree that teacher identity is not fixed; instead, it is dynamic, shifts over time, and is influenced by various factors (Akkerman & Meijer, 2011; Beauchamp & Thomas, 2009; Beijaard et al., 2004; Sachs, 2005).

Beijaard et al. (2004) conducted a literature review on teacher professional identity. They collected 25 studies to understand teacher professional identity and teacher education programs' role in forming teacher identity. They found that the formation of professional identity is an ongoing process, one that is determined by "competing perspectives, expectations, and roles" that teachers "confront and adapt to" (p. 115). Similarly, Beauchamp and Thomas (2009) explained that teachers experience many shifts in identity due to interactions with their school communities. Beijaard et al. (2004) and Beauchamp and Thomas (2009) agreed that teacher education programs must effectively address professional identity with student teachers.

Montessori teacher preparation, on the other hand, pays substantial attention to the inner preparation of the teacher, transforming the adult's thoughts and ideas toward learning, thinking, and human relationships (Christensen, 2019; Cossentino, 2009). This shift in understanding and attitude is crucial to the identity and pedagogy of a Montessori teacher. Montessori (2012) described the "real preparation" of a Montessori teacher as "the study of one's self" (p. 132). She further explained, "The training of the teacher who is to help life is something far more than the learning of ideas. It includes the training of character; it is a preparation of the spirit" (p. 132).

The transformation Montessori often wrote about was specific not only to the spirit of the teacher but also to the adult's attitude toward learning and relationships (Christensen, 2019; Cossentino, 2009; Montessori, 1995). A Montessori teacher's attitude toward learning must transform from seeing the student as an empty vessel to be filled with content and knowledge. A Montessori teacher sees the student as a human being in which the teacher's role is to "ensure every child shall make the best of himself" (Montessori, 1995, p. 285). Montessori teachers understand their role in supporting students in reaching their highest level of intellectual and emotional development to be contributing members of society (Montessori, 1964, 1989, 1995). Christensen (2019) elaborated on the preparation of the teacher as central to the Montessori pedagogy, noting that Montessori clearly defined "who a Montessori teacher should be" (p. 47). At the same time, Christensen (2016) noted that Montessori teacher transformation is about what happens inside the classroom. It does not include external contexts such as partnering with families or navigating policy.

Teacher Policy Interpretation

All teachers, not just Montessori teachers, navigate policy in their daily practice and in several different ways. The scholarly literature on teacher policy interpretation is often grounded in theories such as street-level bureaucracy (Lipsky, 2010), policy actors (Ball et al., 2011; Ellison et al., 2018), and sensemaking theory (Weick, 1995). Lipsky (2010) referred to teachers as street-level bureaucrats because they have a direct connection to the people for whom policies were, in theory, created. However, street-level bureaucrats are interpreting the policy at the direct point of impact. Teachers, as street-level bureaucrats, struggle with the dilemma of treating all students the same but also individualizing learning in a standard system (Hohmann, 2016). Maynard-Moody and Musheno (2003) referred to this as a "dual existence of law abidance and cultural abidance" (p. 4), where teachers' beliefs rub against rules and policies. For example, street-level-bureaucracy theory includes teachers responding to accountability policies by creating consistent routines and rationing resources. Yet Anagnostopoulos (2003) found that teachers reported losing instructional time to testing and did not believe that the district policies shaped the curriculum they valued in their teaching.

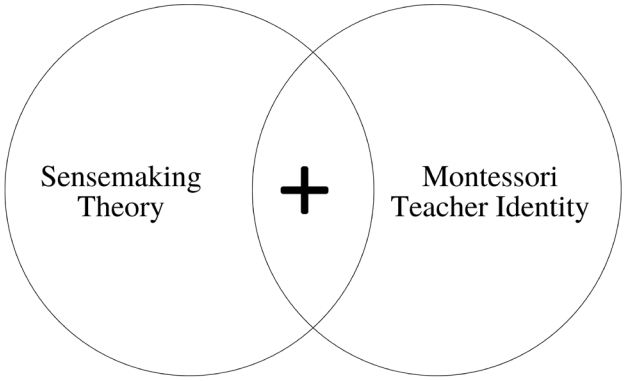
Ball et al. (2011) described several policy actor roles a teacher may play, such as the entrepreneur whose policy work includes advocacy and creativity. In contrast, another teacher may be a receiver, whose policy work

includes coping and defending. Participants in the Ellison et al. (2018) study shared a belief that policies that claim to be focused on improving student outcomes, such as standardized testing, take away their ability to individualize teaching and are more focused on a one-size-fits-all approach. In other words, current educational policies are doing more harm than good.

Theoretical Framework

Regardless of the policy-interpretation theory, teachers are the most vital link between policy and practice (Hohmann, 2016). The way in which teachers interpret or make meaning of policy directly affects their pedagogical decisions and student learning. Grounded in individual and social experiences, sensemaking theory supports understanding teachers' dynamic processes to make meaning of education policies that shape their pedagogy and adjust their advocacy actions (März & Kelchtermans, 2013; Weick, 1995). Therefore, sensemaking theory and literature on teacher identity informed the theoretical framework of this study, as shown in Figure 1.

Figure 1
Theoretical Framework



Sensemaking Theory
Grounded in identity construction, the activity of making sense of ideas, and constructing meaning (Weick, 1995).

Montessori Teacher Identity
Substantial attention to the inner preparation of the teacher, the adult's thoughts and ideas toward learning, thinking, and human relationships (Christensen, 2019; Cossentino, 2009).

Sensemaking theory refers to the ways in which people make sense of ideas in their environment and enact those ideas in meaningful ways (Rom & Eyal, 2019; Weick, 1995). Further, sensemaking "determines what people see and do and what they perceive to be real, and why people give different interpretations to the same events or the same interpretations to different ones" (Rom & Eyal, 2019, p. 63). Thus, the way teachers make sense of policies is influenced by their connection to policy messages and through the lens of preexisting beliefs and experiences, which inform a teacher's identity (Coburn, 2004, 2005). For example, Rom and Eyal (2019) elaborated on teacher-identity conflicts that shaped policy implementation and articulated new ideas about how teachers construct meaning. In their study, the focus was on early childhood teachers. Through experiences with policy, teachers shared internalized feelings about pedagogy and values, which led to shaping how they viewed themselves as early childhood professionals (Rom & Eyal, 2019). If educators could successfully reconcile their professional identity with complex policy understandings, they felt a sense of achievement. If not, they felt "disappointed, devalued, defeated, or expressed a desire to dissociate" (Rom & Eyal, 2019, p. 72). Additionally, teachers may question their pedagogical identity according to how a policy is enforced (Coburn, 2005; Rom & Eyal, 2019).

As Weick (1995) explained, it's important to note that sensemaking and interpretation are not the same. Sensemaking is an activity, whereas interpretation is more likened to a process—a process that is detached from the activity. Teachers must be actively engaged to make sense of policies effectively; they must see themselves in the policy before interpretation. Otherwise, teacher response to policies may be simply translating an idea in a new way rather than grounded in their pedagogy. Further, one distinguishing characteristic of sensemaking theory is that it is rooted in identity construction. Teachers learn more about their identities through experience and observation of those experiences; through attempting to shape and react to environments simultaneously; and through recognizing that their identity, rather than the experience, is what actually needs to be interpreted (Weick, 1995). Therefore, policy implications are defined by the Montessori teacher's identity. This understanding guided the analysis of the qualitative interview and group-level assessment data, focused on public school Montessori teacher experiences with policies.

Methods

Following fundamental phenomenological concepts such as describing a person's experience in the way they explain it (Bevan, 2014), I relied on multiple interviews with each participant to examine teacher experiences with education policies (Read, 2018). I then used themes from

Table 1
Participant Demographics

Pseudonym	No. of years teaching	Level	State
Jill	6	Early Childhood (preschool/kindergarten)	Ohio
Claire	13	Early Childhood (preschool/kindergarten)	Ohio
Kathy	22	Lower Elementary (1st, 2nd, & 3rd grades)	Ohio
Tammy	27	Upper Elementary (4th, 5th, & 6th grades)	Ohio
Flo	7	Upper Elementary (4th, 5th, & 6th grades)	Illinois
Allie	6	Middle School (7th & 8th grades)	North Carolina
Noah	12	High School (11th &12th grades)	Wisconsin
Ashley	2	High School (11th & 12th grades)	Wisconsin

Table 2
Serial Interviews

Week 1		
Interview 1	Focused on the participant's Montessori teaching history	Montessori teacher identity
Week 2		
Interview 2	Focused on the participant's detailed experiences with policy	Montessori teacher's response to policies
Week 3		
Interview 3	Focused on the participant's making meaning of perceived experiences	Sensemaking theory

the interviews to develop the protocol for a modified group-level assessment process with participants (Vaughn & Lohmueller, 2014).

Participants

Using snowball sampling, eight noncharter, public school Montessori teachers, outlined in Table 1, were recruited from four states.

Data Collection and Analysis

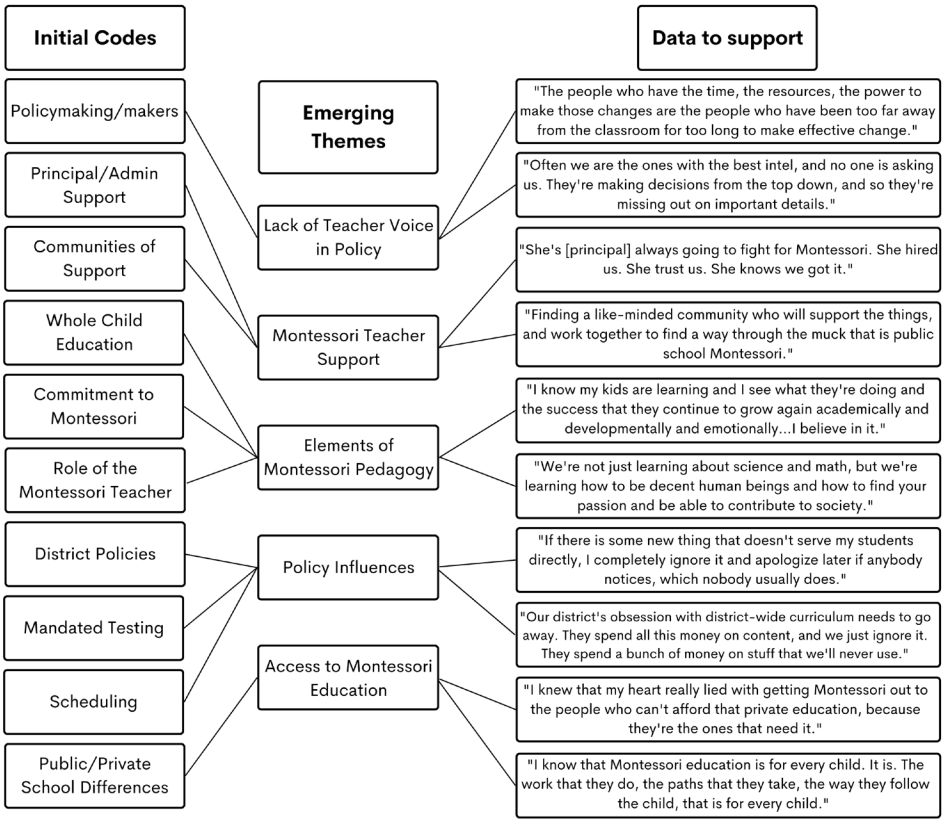
I conducted 30-minute semistructured interviews over 3 weeks, one interview per week. This format, known as *serial interviews*, made participation feasible for teachers with limited time to participate (Read, 2018). The extra time between each interview also allowed for researcher reflexivity practices such as writing memos and initial readings of data. Each interview was designed to capture a different aspect of the participants' experiences, as outlined in Table 2.

Data collection and analysis occurred concurrently. To analyze the data, I used a thematic analysis approach (Braun & Clarke, 2006). After each week of interviews, I read transcriptions, familiarized myself with the data, and began generating initial codes. By conducting an analysis between each interview, I could explore different aspects of participant experiences and double-check the information shared in each interview (Read, 2018). Participants also received transcripts of their interviews for member checking (Lincoln & Guba, 1986). Upon completion of all interviews, I continued with data analysis and identified emerging themes through the generated codes. Figure 2 outlines initial codes, emerging themes, and supportive example data.

Finally, I facilitated a virtual modified *group-level assessment* (GLA) with interview participants. A GLA is a participatory group method used to collaboratively generate and analyze data through developing community and leading to action steps (Vaughn & Lohmueller, 2014). The goal of the GLA was to enhance awareness of policy issues, connect participants in their advocacy engagement, and validate themes from the interview data. All participants were invited to the GLA; however, because of time and capacity, only three participants attended (Kathy, Jill, and Allie).

The Appendix shows the prompts developed from the themes identified through the interview data analysis. Participants responded to each prompt and then reviewed and analyzed their responses to identify themes. The

Figure 2
Interview Data Analysis



GLA participants synthesized their responses through three themes: elements of Montessori pedagogy in which "it's more than the materials," districts attempting to "force a square peg in a round hole," and lack of respect for teachers' expertise at the district level. Four themes I identified in the interview data align with the themes identified by GLA participants, as shown in Table 3. These themes are discussed further in the next section.

Findings

The overarching goal of this study was to understand Montessori public school teacher experiences with policies that influence their pedagogy. Through interviews and a culminating group-level assessment session, three themes emerged as teachers shared their experiences with educational policies: Montessori pedagogy is more than the materials, districts often force district-

Table 3
Theme Alignment Between Interview Data and Group-Level Assessment

Group-level assessment themes (identified by teachers)	Themes from interview data (identified by researcher)
Elements of Montessori pedagogy—it's more than the materials"	Elements of Montessori pedagogy
Districts "force a square peg in a round hole"	Policy influences and Montessori teacher support
Lack of respect for teachers' expertise at the district level	Lack of teacher voice in policy

wide requirements that are at odds with the Montessori pedagogy, and Montessori teachers in public schools do not feel respected or supported.

It's More Than the Materials

Implementing high-fidelity Montessori education in public schools requires a commitment to the Montessori pedagogy by the district, school, and teacher. It also requires an understanding of Montessori education, beyond the materials in the classroom. Seven participants spoke at length about their commitment to the Montessori pedagogy, regardless of the school or district in which they work. Flo shared, "I'm a Montessori teacher. If you don't want me here, just get rid of me. Do what you got to do. I'm not going to water myself down." Other participants used phrases such as "firm believer in Montessori" and "I believe in the potential of everything that Montessori offers." Claire reported how she prioritizes Montessori pedagogy by stating, "I put the philosophy first and the standard second. … I know what works for kids." When asked what it means to be a Montessori teacher, all eight participants spoke of whole child education. Allie explained, "We tend to silo them [subjects], but they really all work together. … It's the education of the whole child and not just worrying about, can you calculate the area of a circle?" Noah further elaborated, "You don't just teach science, you're trying to integrate it with everything else and do larger projects. And educate the whole child rather than just teach them the parts of the cell. To educate the whole child, we have to care about more than test scores." As Flo explained,

> *The goal is to make whole human beings.… It's an entire system set up to help children be successful in their own lives. I just don't know how you manage to do that if all you really care about is math scores and reading scores. You just don't. I'm a whole human being, and I have way more shoved into me than math and reading.*

At the same time, participants shared that Montessori education is not just about using the Montessori materials to teach. Whole child education requires more. As Flo explained, it requires "more time and energy and love and passion." Further, four of the participants talked about teacher training when asked what it takes to be a Montessori teacher. Similarly, Ashley shared, "It's not like you have to have these crazy resources to implement it. You just need to know how to do it." Yet, three participants also shared that it is not a requirement to have a Montessori teaching credential to teach at their school.

Tammy spoke of being taught to use the Montessori materials to teach but also shared that she would like to see more for public school Montessori teachers to "understand how to connect and engage all learners, and pull out the genius that is inherently in each child." Ashley also shared her frustration with the lack of credentialed Montessori teachers at her school: "If we are a true Montessori high school, then we should truly have all the teachers trained to be a Montessori teacher." Additionally, GLA prompt responses included a call for more Montessori-specific professional development in the district.

Forcing a Square Peg in a Round Hole

Although the phrase "square peg in a round hole" was from a GLA prompt response, many participants spoke of their school districts using a one size fits all approach that is at odds with the Montessori pedagogy. District-wide requirements were a common challenge that participants shared as influencing their pedagogy. Further, the role the administrator plays in supporting teachers is paramount to implementing Montessori pedagogy with high fidelity in public schools.

District-Wide Requirements

This study set out to focus on educational policies in general. However, participants spent most of their time in interviews specifically talking about district policies that influence their pedagogy in the classroom. For example, mandated testing layered on top of already-mandated state tests is a common challenge. In Montessori public schools, teachers feel this pressure twofold because standardized testing is not part of Montessori pedagogy. Kathy shared, "I think there needs to be some form of accountability, but that we have MAP [Measures of Academic Progress] testing, and we have state testing, and we have DIBELS [Dynamic Indicators of Basic Early Literacy Skills], and we have all these facets, and kids are just overloaded."

At the same time, several participants commented on how they feel about testing and how their Montessori pedagogy does not necessarily need to shift. For example, Allie said, "I think there is a level of standardized testing and accountability that is not a bad thing." She went on to share how teachers could use testing differently to better align with the Montessori pedagogy: "We don't use it

[testing] to look at a child, not for deficiencies, but from a growth standpoint and seeing how far they've come and where we can use it, reflectively on our teaching practices rather than punitively." Kathy further explained the connection between her commitment to the Montessori pedagogy and mandated testing:

> *I feel like if you're a really strong Montessori teacher, the test shouldn't tell you anything you don't know about your kids because you're so engaged with what your kids are doing. I'm working with my kids one on one all the time. So, when I see that they don't know something, it's like, yeah, I know they don't know that.*

Allie also showed her commitment to Montessori pedagogy through mandated testing requirements by sharing,

> *I'm able to very confidently say to parents, I hear you on your testing concerns, but I can promise you, no matter where your child chooses to go or what they choose to do, they will be prepared. And being prepared is so much more than a test score, and a GPA and a test, an end-of-the-year standardized test.*

Beyond testing requirements, Ashley and Noah explained their struggles with the building schedules that limit their time with students to 60–90 minutes each day. They both independently described how they observe students struggling to get in the flow they need to work on projects for longer periods of time—a core tenet of the Montessori philosophy (Montessori, 1964). Noah further explained a shift to their building's schedule that was made specifically because of attendance procedures; front office staff need to locate students quickly, block scheduling is confusing, and "attendance means dollars [to the district]."

Participants also described different ways they respond to district-wide requirements. Claire shared, "If there is some new thing that doesn't serve my students directly, I usually completely ignore it and apologize later if anybody notices, which nobody usually does." Flo explained a new scope and sequence the district said all schools had to follow. She worked with colleagues in her building to show the district how Montessori education hits all standards. Flo reported, "It was a legitimate three-year battle to even get them to sit down in a meeting with us and look at our scope and sequence to prove that we are actually doing what they want us to do." Finally, Jill described a discipline committee attempting to develop a district-required school-wide acknowledgment system. Rather than rooting the system in rewards, the committee is working to develop a more intrinsically motivated system in better alignment with Montessori philosophy.

Several participants also often used the phrase "prove ourselves" when talking about district-wide requirements. Kathy stated, "We're still having to jump through hoops to prove ourselves. Why do you keep creating more magnet schools for families to choose if you clearly .... Why would you do that if you don't believe in something?" Claire simply stated, "I'm tired of proving my worth."

Support From Administration and Colleagues

Creating and finding communities of support is crucial to the well-being of teachers. Flo and Claire both talked about the importance of "like-minded communities" to support their work as Montessori teachers in public settings. For Flo, that support comes from a mentor who she explains as "very much my school self-care [in] that she's doing the same thing [as me], but she's also [10 years my senior] in teaching and in age. And she's a great mentor." For Claire, support comes from

> *… other teachers in my building or in the district, really. And I think that's as far as it goes. There aren't resources within the district for us to reach out to touch base with. And it's between myself and my colleagues.*

A key person in the support system of a public school Montessori teacher is the school administrator. Of the eight participants in the study, only four had Montessori-credentialed administrators. Kathy and Tammy shared in their interviews that they believe teachers need administrators who understand Montessori education, but more importantly they describe a need for administrators to believe in the pedagogy. The GLA responses also affirmed this. Flo said her Montessori-credentialed administrator is "always going to fight for Montessori." However, according to several participants without credentialed Montessori administrators, their administrators are committed first to the district and then to the Montessori pedagogy. For example, Allie explained how her administrator deals with district demands that do not align with Montessori pedagogy:

> *I think some of it is that there just isn't enough experience with Montessori to really be able to understand how it could affect us, that the changes*

> *are just kind of made and we are left to pick up the pieces and solve the problems around the change so that it meets the needs of our students.*

Noah further elaborated:

> *Montessori administrators, or administrators in general, need to default back and hold the district line because at the end of the day, they want to keep their jobs … because even though we would hope that they go to bat for the school, our boss still [has] 20 years or 15 years left in the district. She wants to remain in her job.*

Claire and Jill explained experiences with shifting the way they teach when a non-Montessori credentialed administrator is observing them. Claire shared,

> *Even though I am somebody who puts zero weight in any of the ratings, I still want my principal to know that I do a good job. And so I feel like I need to meet those metrics because that's her language to understand that I do a good job.*

Jill shared a similar experience in that she often extends lessons to include the whole group for longer periods of time when being observed by her non-Montessori credentialed administrator.

Ultimately, all teachers who participated in this study explained the importance of connecting with other teachers and colleagues in their districts. Allie explained,

> *We can't just hide in our classrooms anymore and hide in our little schools and be under the radar …. That's also not helping the world of public Montessori, if we're constantly hiding ourselves under a rock and keeping ourselves hidden there.*

At the same time, the capacity to connect with other Montessori teachers, to ask for support, and to interact beyond the classroom walls was dependent on the years of teaching experience participants had. For example, Allie, who had been teaching in a Montessori classroom for only 2 years, shared, "There's still so much I just don't know, and I don't know how to even go about raising my concerns sometimes." She further elaborated on her confidence in speaking up when a rule or procedure does not align with her Montessori pedagogy: "I feel like it will be 5 years before I truly feel like, okay, that is what I'm thinking, this is how I'm going to say it, this is who I'm going to say it to." Jill, who has been teaching in a Montessori classroom for 6 years, felt a sense of what she referred to as "a bigger purpose" and joined a local nonprofit Montessori organization that specifically focuses on professional development for Montessori teachers. However, she shared that she still has "no idea outside of that where to go, who to contact, anything like that" to respond to policies outside of her district. On the other hand, Claire and Kathy with 13 and 22 years of Montessori teaching experience respectively, both exhibited a high level of confidence in their Montessori pedagogy. They seemingly navigate policies while prioritizing the Montessori pedagogy—although, they struggle with the tension the policy systems cause. Beyond connecting outside of their classrooms, building and maintaining the confidence to advocate for Montessori education, teachers also need to feel respected.

Lack of Respect for Teacher Expertise

Four participants spoke of the "people who make the policies" as being far removed from the classroom and often do not have a Montessori background. Flo described this as a huge separation between practice and policy, and Kathy referred to it as a "disconnect from the reality of what is happening in the classroom." Top-down decisions seem to be commonplace; Tammy said, "We [teachers] are the ones with the best intel and no one is asking us." Claire elaborated on the top-down decision makers and described how teachers with current experiences in the classroom do not have "energy or resources to put into making change happen." She also said, "If there's a way for us to meet in the middle, okay, great!" On this note, the GLA participants developed one key action item from their themes: districts should create Montessori advocacy committees at each Montessori school in the district.

Discussion

This study sought to understand Montessori public school teachers' experiences with policies that influence their pedagogy. Key findings include a common misunderstanding by district leadership and policymakers that the Montessori pedagogy is simply the use of specific Montessori materials. In fact, the Montessori pedagogy is much more than just the materials. It includes many components, such as freedom and structure and the development of community (Lillard, 1972). Two additional findings in this study include (a)

school districts often force district-wide requirements on Montessori schools that are at odds with the Montessori pedagogy, and (b) Montessori public school teachers do not feel respected or supported. These two findings are intricately connected; if district leadership honored the experience of Montessori teachers in their district, it would realize different policies are needed for different pedagogies. Further, tensions created by policy misalignment do not occur only between the pedagogy and the policy. The identity of the Montessori teacher plays a crucial role.

To further my interpretation, I turned to the literature on teacher identity. A Montessori teacher is taught to be dedicated to self-reflection, inner preparation, and whole-child education. This is the lens in which a teacher makes sense of policies. If Montessori teachers have internalized that the Montessori pedagogy is more than materials and their district or school is fully committed to the pedagogy, then they are more likely to feel confident in implementing high-fidelity Montessori education, regardless of district policies that do not align. The multiple layers of teacher support and district-leadership decisions must overcome the Montessori teacher's possible uncertainty about their identity (Christensen, 2016; Malm, 2004). Additionally, teachers' professional identity is at the core of their work, providing insight for how to act and understand (Sachs, 2005). When teachers are often at the bottom of the policy hierarchy and constantly feel they need to prove the value of their identity, they struggle to make sense of policies and of their experiences (Christensen, 2016; Ellison et al., 2018). Moreover, Beauchamp and Thomas (2009) explained that teachers experience many shifts in identity because of interactions with their school communities. In this way, teachers lean on each other to make sense of their work environments and their own identity.

During the interviews in this study, I intentionally defined policies as any rule or regulation that is imposed on teachers. Although participants often referred to federally and state-mandated standardized testing as a key challenge, the most salient challenges identified in this study were directly related to district-specific policies, highlighting the need for continued research to understand Montessori public school teachers' experiences with district-specific policies.

Limitations

This study contributes to the literature by attempting to fill the mostly unexplored area of Montessori teachers' pedagogy and their experiences with policies, but it is also important to acknowledge limitations. First, my experiences as a Montessori parent, teacher, teacher educator, and advocate may have influenced the questions and comments in interviews. For example, in one interview Jill shared how she did not think she did much to advocate for Montessori education. Considering the advocacy work I was previously involved in, I pointed out times when Jill had, in fact, been a strong advocate for Montessori education. Engaging in reflexivity to embrace my positionality was crucial to the study's process (Holmes, 2020). Second, all participants were recruited from Montessori conferences and through snowball sampling. Therefore, many of the participants may have had experience in advocating for Montessori education prior to the study. Prior advocacy experience was not considered before recruitment but may shift the findings if all teachers report high levels of advocacy engagement. Finally, only three participants participated in the GLA. The GLAs are designed for larger groups, yet the small group in this GLA produced meaningful qualitative results while building community among the participants (Vaughn et al., 2011).

Conclusion

Teachers and educators in many Montessori public schools have found ways to respond to policies while also upholding high-fidelity Montessori education (Block, 2015; Jackson, 2022; Murray & Peyton, 2008; Scott, 2017). For example, Jackson (2022) found teachers working together with creative scheduling and participating in Montessori-specific professional development from their district. This study builds on these efforts by increasing district leaders' and administrators' understanding of the pedagogical uncertainties that Montessori teachers experience in public schools to inform supportive policies for the Montessori pedagogy, rather than policies that require teachers to shift the Montessori Method. School districts can show their commitment to high-fidelity Montessori education and Montessori teachers in several ways, as discovered through this study's findings. First, school districts can offer Montessori-specific professional development and paid Montessori-credential training for teachers. Second, rather than district-wide requirements, school districts can prioritize individualized curriculum, testing, and schedule decisions for each school in the district. Third, school districts can hire building administrators who have Montessori credentials or a strong understanding and commitment to the pedagogy.

Fourth, Montessori teacher-education programs can include advocacy and an understanding of educational policy systems in their teacher-education curricula. Finally, school districts can support Montessori teachers currently working in public schools by listening to their experiences and expertise and including them as part of the decision-making processes.

Regardless of the policy struggles, the Montessori Method is one of the largest global alternative approaches to education, with an estimated 15,763 Montessori schools worldwide (Debs et al., 2022). In addition, the United States is one of the countries with the largest number of government-funded or public Montessori programs. Policymakers, school districts, and school leaders should determine how to keep teachers from being "swept up in a flow of mandates that consume their thinking, their energy, and for some, even their love of teaching" (Valli & Buese, 2007, p. 545). To get there, future research could expand the scope of participants to first understand their level of engagement in policies that shape their Montessori pedagogy in public schools and then explore ways to support them and Montessori education in public schools; this research should be based on the understanding of the educational policy landscape.

Funding Acknowledgement

This research was supported by an AMS Mini-Grant Award.

Author Information

Heather E. Gerker is a doctoral candidate at University of Cincinnati. She can be reached at gerkerhr@mail.uc.edu.
https://orcid.org/0000-0002-8011-6921

References

Abrams, L. M., Pedulla, J. J., & Madaus, G. F. (2003). Views from the classroom: Teachers' opinions of statewide testing programs. *Theory into Practice, 42*(1), 18–29. https://doi.org/10.1207/s15430421tip4201_4

Akkerman, S. F., & Meijer, P. C. (2011). A dialogic approach to conceptualizing teacher identity. *Teaching and Teacher Education, 27*(2), 308–319. https://doi.org/10.1016/j.tate.2010.08.013

Anagnostopoulos, D. (2003). The new accountability, student failure, and teachers' work in urban high schools. *Educational Policy, 17*(3), 291–316. https://doi.org/10.1177/0895904803017003001

Au, W. (2011). Teaching under the new Taylorism: High-stakes testing and the standardization of the 21st century curriculum. *Journal of Curriculum Studies, 43*(1), 25–45. https://doi.org/10.1080/00220272.2010.521261

Ball, S. J., Maguire, M., Braun, A., & Hoskins, K. (2011). Policy actors: Doing policy work in schools. *Discourse: Studies in the Cultural Politics of Education, 32*(4), 625–639. https://doi.org/10.1080/01596306.2011.601565

Beauchamp, C., & Thomas, L. (2009). Understanding teacher identity: An overview of issues in the literature and implications for teacher education. *Cambridge Journal of Education, 39*(2), 175–189. https://doi.org/10.1080/03057640902902252

Begin, J. (2014). Montessori early childhood education in the public sector: Opportunities and challenges. *NAMTA Journal, 39*(2), 61–90.

Beijaard, D., Meijer, P. C., & Verloop, N. (2004). Reconsidering research on teachers' professional identity. *Teaching and Teacher Education, 20*(2), 107–128. https://doi.org/10.1016/j.tate.2003.07.001

Berliner, D. (2011). Rational responses to high stakes testing: The case of curriculum narrowing and the harm that follows. *Cambridge Journal of Education, 41*(3), 287–302. https://doi.org/10.1080/0305764X.2011.607151

Bevan, M. T. (2014). A method of phenomenological interviewing. *Qualitative Health Research, 24*(1), 136–144. https://doi.org/10.1177/1049732313519710

Block, C. R. (2015). Examining a public Montessori school's response to the pressures of high- stakes accountability. *Journal of Montessori Research, 1*(1), 42–54. https://doi.org/10.17161/jomr.v1i1.4913

Borgman, C. (2021). *Enacting accountability in innovative schools: The sensemaking strategies of public Montessori principals* [Doctoral dissertation, University of Virginia]. Archive, University of Virginia. https://libraetd.lib.virginia.edu/public_view/w95051224

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology, 3*(2), 77–101. https://doi.org/10.1191/1478088706qp063oa

Christensen, O. (2016). Proving Montessori: Identity and dilemmas in a Montessori teacher's lived experience. *Journal of Montessori Research*, *2*(2), 35–48. https://doi.org/10.17161/jomr.v2i2.5067

Christensen, O. T. (2019). Montessori identity in dialogue: A selected review of literature on teacher identity. *Journal of Montessori Research*, *5*(2), 45–56. https://doi.org/10.17161/jomr.v5i2.8183

Coburn, C. E. (2004). Beyond decoupling: Rethinking the relationship between the institutional environment and the classroom. *Sociology of Education, 77*(3), 211–244. https://doi.org/10.1177/003804070407700302

Coburn, C. E. (2005). Shaping teacher sensemaking: School leaders and the enactment of reading policy. *Educational Policy, 19*(3), 476–509. https://doi.org/10.1177/0895904805276143

Cossentino, J. (2009). Culture, craft & coherence: The unexpected vitality of Montessori teacher training. *Journal of Teacher Education, 60*(5), 520–527. https://doi.org/10.1177/0022487109344593

Culclasure, B., Fleming, D. J., & Riga, G. (2018). *An evaluation of Montessori education in South Carolina's public schools*. The Riley Institute at Furman University. https://eric.ed.gov/?id=ED622145

Debs, M., de Brouwer, J., Murray, A. K., Lawrence, L., Tyne, M., & von der Wehl, C. (2022). Global diffusion of Montessori schools: A report from the 2022 Global Montessori census. *Journal of Montessori Research, 8*(2), 1–15. https://doi.org/10.17161/jomr.v8i2.18675

Dohrmann, K. R., Nishida, T. K., Gartner, A., Lipsky, D. K., & Grimm, K. J. (2007). High school outcomes for students in a public Montessori program. *Journal of Research in Childhood Education, 22*(2), 205–217. https://doi.org/10.1080/02568540709594622

Ellison, S., Anderson, A. B., Aronson, B., & Clausen, C. (2018). From objects to subjects: Repositioning teachers as policy actors doing policy work. *Teaching and Teacher Education, 74*, 157–169. https://doi.org/10.1016/j.tate.2018.05.001

Hohmann, U. (2016). Making policy in the classroom. *Research in Comparative and International Education, 11*(4), 380–393. https://doi.org/10.1177/1745499916679561

Holmes, A. G. D. (2020). Researcher positionality: A consideration of its influence and place in qualitative research. *Shanlax International Journal of Education, 8*(4), 1–10. https://doi.org/10.34293/education.v8i4.3232

Jackson, J. R. (2022). Maintaining the Montessori method in Louisiana public schools: A qualitative descriptive study [Doctoral dissertation, Grand Canyon University]. Grand Canyon University ProQuest Dissertations Publishing. https://www.proquest.com/docview/2686240438?pq-origsite=gscholar&fromopenview=true

Levatino, A., Parcerisa, L., & Verger, A. (2023). Understanding the stakes: The influence of accountability policy options on teachers' responses. *Educational Policy*. https://doi.org/10.1177/08959048221142048

Lillard, A. S. (2012). Preschool children's development in classic Montessori, supplemented Montessori, and conventional programs. *Journal of School Psychology, 50*(3), 379–401. https://doi.org/10.1016/j.jsp.2012.01.001

Lillard, A., & Else-Quest, N. (2006). Evaluating Montessori education. *Science, 313*(5795), 1893–1894. https://doi.org/10.1126/science.1132362

Lillard, A. S., & Heise, M. J. (2016). An intervention study: Removing supplemented materials from Montessori classrooms associated with better child outcomes. *Journal of Montessori Research, 2*(1), 16–26. https://doi.org/10.17161/jomr.v2i1.5678

Lillard, A. S., Heise, M. J., Richey, E. M., Tong, X., Hart, A., & Bray, P. M. (2017). Montessori preschool elevates and equalizes child outcomes: A longitudinal study. *Frontiers in Psychology*, 8, 1–19. https://doi.org/10.3389/fpsyg.2017.01783

Lillard, P. P. (1972). *Montessori: A modern approach*. Schocken Books.

Lincoln, Y. S., & Guba, E. G. (1986). But is it rigorous? Trustworthiness and authenticity in naturalistic evaluation. *New Directions for Program Evaluation, 1986*(30), 73–84. https://doi.org/10.1002/ev.1427

Lipsky, M. (2010). *Street-level bureaucracy: Dilemmas of the individual in public service*. Russell Sage Foundation.

Malm, B. (2004). Constructing professional identities: Montessori teachers' voices and visions. *Scandinavian Journal of Educational Research, 48*(4), 397–412.

März, V., & Kelchtermans, G. (2013). Sense-making and structure in teachers' reception of educational reform. A case study on statistics in the mathematics curriculum. *Teaching and Teacher Education, 29*, 13–24. https://doi.org/10.1016/j.tate.2012.08.004

Maynard-Moody, S., & Musheno, M. (2003). *Cops, teachers, counselors: Narratives of street-level judgment.* University of Michigan Press.

Montessori, M. (1964). *The Montessori Method.* Schocken Books.

Montessori, M. (1989). *Education for a new world.* The Clio Montessori Series.

Montessori, M. (1995). *The absorbent mind* (Rev. ed.). Henry Holt.

Montessori, M. (2012). *The absorbent mind* (Vol. 1). Montessori-Pierson Publishing Company.

Montessori Public Policy Initiative. (2015). *Montessori essentials*. https://montessoriadvocacy.org/wp-content/uploads/2019/07/MontessoriEssentials.pdf

Murray, A., & Peyton, V. (2008). Public Montessori elementary schools. *Montessori Life, 20*(4), 26–30.

Murray, A. K., & Daoust, C. (2023). Fidelity issues in Montessori research. In A. Murray, E. M. T. Ahlquist, M. McKenna, & M. Debs (Eds.), *The Bloomsbury handbook of Montessori education* (pp. 199–208). Bloomsbury Publishing.

Perryman, J., Ball, S. J., Braun, A., & Maguire, M. (2017). Translating policy: Governmentality and the reflective teacher. *Journal of Education Policy, 32*(6), 745–756. https://doi.org/10.1080/02680939.2017.1309072

Read, B. L. (2018). Serial interviews: When and why to talk to someone more than once. *International Journal of Qualitative Methods, 17*(1). https://doi.org/10.1177/1609406918783452

Rom, N., & Eyal, O. (2019). Sensemaking, sense-breaking, sense-giving, and sense-taking: How educators construct meaning in complex policy environments. *Teaching and Teacher Education, 78*, 62–74. https://doi.org/10.1016/j.tate.2018.11.008

Sachs, J. (2005). Teacher education and the development of professional identity: Learning to be a teacher. In P. Denicolo & M. Kompf (Eds.), *Connecting policy and practice: Challenges for teaching and learning in schools and universities* (pp. 5–21). Routledge.

Scott, C. M. (2017). Un-"chartered" waters: Balancing Montessori curriculum and accountability measures in a charter school. *Journal of School Choice, 11*(1), 168–190. http://dx.doi.org/10.1080/15582159.2016.1251280

Valli, L., & Buese, D. (2007). The changing roles of teachers in an era of high-stakes accountability. *American Educational Research Journal, 44*(3), 519–558. https://doi.org/10.3102/0002831207306859

Vaughn, L. M., Jacquez, F., Zhao, J., & Lang, M. (2011). Partnering with students to explore the health needs of an ethnically diverse, low-resource school: An innovative large group assessment approach. *Family & Community Health, 34*(1), 72–84. http://www.jstor.org/stable/44953574

Vaughn, L. M., & Lohmueller, M. (2014). Calling all stakeholders: Group-level assessment (GLA)—A qualitative and participatory method for large groups. *Evaluation Review, 38*(4), 336–355. https://doi.org/10.1177/0193841X14544903

Weick, K. E. (1995). *Sensemaking in organizations* (Vol. 3). Sage.

Whitescarver, K., & Cossentino, J. (2008). Montessori and the mainstream: A century of reform on the margins. *Teachers College Record, 110*(12), 2571–2600. https://doi.org/10.1177/016146810811001202

Williamson, P., Bondy, E., Langley, L., & Mayne, D. (2005). Meeting the challenge of high-stakes testing while remaining child-centered: The representations of two urban teachers. *Childhood Education, 81*(4), 190–195. https://doi.org/10.1080/00094056.2005.10522271

Appendix
Group-Level Assessment Prompts

1. Teachers need administrators who ….
2. If I could change one thing about standardized testing, it would be ….
3. I feel most supported in my teaching when ….
4. We could increase state policymakers' awareness of the Montessori Method by ….
5. In an ideal world, public schools would ….
6. I think _____ likely helps Montessori teachers in public schools the most.
7. Our biggest challenge using the Montessori Method in public schools is ….
8. Advocacy work is ….
9. To me, commitment to the Montessori pedagogy means ….
10. A Montessori public school administrator that does not have a Montessori credential is ….
11. When a new policy or rule is announced at my school, I feel ….
12. The best thing about teaching in a public school is ....
13. I am most confident in my teaching when ….
14. I wish more people knew _____ about Montessori education in public schools.
15. Education policies should be made by ….