Use of Case Studies in Montessori Leadership Preparation Programs

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Abstract: This paper examines the impact and relevance of the use of case studies as a teaching and learning tool in Montessori leadership programs. Frequently used as learning tools in educational leadership preparation programs, selected case studies were limited to those in Montessori leadership and language. Surveys and interviews with graduate students and program faculty were conducted to understand the relevance of case studies in coursework and to provide implications for further refinement of their use. Results suggest certain elements of case studies can enhance learning theory and serve as springboards to practice. Maria Montessori advocated for reflective practice; therefore, we are extrapolating that case studies may be a powerful and effective connection of scholarly study of theory to classroom practice. However, these benefits may not be well-clarified or highly valued in Montessori leadership coursework. With use of case studies in Montessori leadership coursework, an opportunity exists for faculty to reflect on strategies for using case studies and best practices. Content specific to Montessori settings may further support the usefulness and effectiveness of case studies and their impacts on student learning in Montessori leadership programs.

Use of case studies is frequently applied as a strategy for teaching and learning in graduate programs in leadership. Post-COVID leadership preparation programs have used case studies as a meaningful and productive way to introduce students to problems of practice as well as allow opportunities to apply decision-making to their emerging leadership. Case studies enhance and fill gaps about leadership challenges that leaders may not have exposure to in their own settings (Leggett & Smith, 2022; Robertson & Muirhead, 2017). Case studies have historically been used in business, law, and medical schools, as well as other graduate-level programs.

Their purpose has been to teach critical thinking skills by asking students to analyze a situation, identify key problems, and develop solutions or recommendations (Rahayu & Zutiasari, 2022). Particularly in school leadership preparation programs, case-based instruction is widely used to challenge students to solve multifaceted problems, with the purpose of transferring theory to practice (Vennebo & Aas, 2023). Self-reflection is a vital component of the leadership role according to Maria Montessori, who said, "Those who direct others must themselves be transformed. No one can ever be a leader or a guide who has not prepared for that work" (as cited

in Bennetts & Bone, 2020, p. 5). Reflective leaders can improve their effectiveness and influence the reflective practices of other adults in their school communities (York-Barr et al., 2016). Robertson and Muirhead (2017) concluded that purposefully designed case studies support critical reflection in higher education. We perceive the use of case studies in Montessori leadership preparation courses as an extension of our earlier work (Damore & Rieckhoff, 2021) and as an opportunity for self-reflection on the part of program faculty and students.

We frequently utilized case studies from our graduate leadership courses and most recently in teaching a course designed specifically for Montessori leadership. Our previous research and focus on reflective leadership's impact on school leaders' roles as instructional supervisors (Damore & Rieckhoff, 2019, 2021; Rieckhoff & Damore, 2017) led us to an inquiry about the use of case studies as a form of leadership learning and reflection in our assignments for students. Previously, we concluded that self-reflection is critical to a Montessori school leader's success. Self-reflection initiates a process that empowers leaders to model and influence reflective practices, with direct effects on teacher reflection and school improvement (Damore & Rieckhoff, 2021). Reflection represents a key component in school improvement models. Leadership for school improvement is expected of all administrators, including those who lead Montessori schools (American Montessori Society [AMS], 2018; National Policy Board for Educational Administration [NPBEA], 2015). As stated in the abstract, we are extrapolating that case studies may be an extension of scholarly study of theory to connect applied practice. Several researchers connect the value of reflection with the teaching strategy of case studies in teacher education (Liu & Chen, 2019; Ulvik et al., 2022).

We believe case studies are a natural extension of reflection about practice as advocated by Montessori (Damore & Rieckhoff, 2021). However, the benefits may not be well understood and may require further examination. Robertson and Muirhead (2017) concluded that purposefully designed case studies support critical reflection in higher education.

Research Questions

The purpose of the study was to explore the use and effectiveness of case studies as teaching and learning tools in Montessori leadership programs. Two research questions guided this study: 1) How does the use of case studies impact teaching in Montessori leadership courses? 2) How does the use of case studies impact adult learners in Montessori leadership courses?

Literature Review

Defining "Case Studies"

Case studies are used across graduate or post-baccalaureate programs as a form of instruction. Cases range from basic "what would you do?" types of questions, to more elaborate and detailed analyses and examinations. The case method is based on two terms—"case" and "study"—which form a single field, "case study" (Schiano & Andersen, 2017). Therefore, the purpose of such a method is to analyze a specific situation that arises under certain conditions, and to choose, with subsequent analysis, a practical solution for the proposed problem (Chumak et al., 2022). Chumak et al. (2022) identified two types of case studies for use in teaching: Harvard (American) and Manchester (European). The first uses larger case studies to find solutions, and the Manchester model focuses on smaller case studies. Yet both focus on practical solutions, based on artificially created or real-life situations, for the problem-solving and reflective process. Case studies offer learners a way to solve problems and assimilate special knowledge (Chumak et al., 2022).

In one example, a leadership management program centered on active learning and critical thinking skills, and concluded that utilizing case studies results in the active learning and improved critical thinking skills students need in leadership proficiencies (Mahdi et al., 2020). The researchers also found that critical thinking questions on course exams challenged students, thus concluding the essentiality of using case studies as a teaching strategy. Critical thinking is a highly researched area, such as with case-based learning (CBL). In CBL classrooms, students typically work in groups on case studies, stories involving one or more characters or scenarios. Kaddouro's 2011 examination of CBL and traditional didactic teaching (lecture-based teaching) found that participants who learned through CBL performed better in the total critical thinking score and all critical thinking subscales than did traditional program participants.

Though we describe above the benefits of using case studies, our review of the extant literature indicates there are challenges to using case studies as they do not alone produce intended learning outcomes. Nilsson (2017) suggests the context of a case study may not align with students' personal experiences and thereby impact the intended learning outcome. Additionally, numerous case

studies are lengthy and with clear objectives not always provided. This work informs the role of the instructor and the need for them to understand, take responsibility for, and implement specific techniques to successfully guide and maintain student engagement. Responsibilities of the instructor include ensuring students feel safe, presenting a case study with clarity, and stating clear guidelines (Nilsson, 2017). Responsibility then turns to the participant's level of accountability, preparedness, and willingness. Nilsson concluded that a combination of these strategies must be taken into consideration when teaching and learning with case studies, thereby indicating accountability on the parts of both teacher and learner.

Nath (2005, p. 2) reported an increasing awareness in the field when applied to education, noting that teachers who are ill-prepared for the "ambiguity of real-life classrooms" often leave the teaching profession and case studies might help fill this gap. Although field experiences are intended to provide realistic views of the complexities of classrooms, they might not always meet this goal. Instructors may want to prepare students for specific experiences, such as teaching in an urban classroom. Field placements may not support these goals or connect specifically to this learning. In contrast, a scenario-based case study can be designed to pinpoint a specific purpose, and as such, higher education faculty are increasing the use of constructed situational scenarios or case studies. These vignettes are typically followed by discussion and reflection opportunities, and can provide students experiences that are not possible with lectures and field work.

Case studies are widely used in educational leadership programs to prepare building or district level leaders (Darling-Hammond et al., 2010). The study of leadership principles may need the augmentation of case studies to connect theory to practice. Robertson and Muirhead (2017, p. 335) explain, "Educational leadership is a human-to-human interaction with little regularity in day-to-day activities." As mentioned, Vennebo and Aas (2023) emphasize that case-based instruction is used to challenge students to multifaceted problems, transferring theory to practice. A review of three well-known case study books (Hanson, 2008; Kowalski, 2008; Midlock, 2011) used for preparing educational leaders revealed the themes and topics most frequently presented. Typically aligned to leadership standards, most cases focus on the following topics: leadership, employee relations and human resources, conflict management,

student conduct, safety, ethics, governance, and law and finance. We present a rationale for using case studies—to provide a problem-solving, decision-making model or case analysis framework. Cases are often framed around a real-life situation describing what has occurred, with consideration for ethical factors. These case study books emphasize reflection and ethical decision-making. As described by Kunselman and Johnson (2004), in Liu and Chen (2019, p. 549), "it is through the case discussion that students find themselves engaging in an active learning environment, which allows them to freely incorporate educational theories in real life settings."

Although the focus of educational leadership can be expansive and elusive, from instructional leadership to organizational management, effective leaders appear to share some common dispositions that may not be easily learned through scholarly study of theory. Such dispositions include core values, open-mindedness, and optimism in challenging situations (Robertson & Muirhead, 2017). These dispositional areas can be addressed more effectively through case study discussion and analysis.

Theoretical Framework

Critical, collaborative inquiry is the combining of study, or theory, with action to promote school improvement, with a specific commitment to uniting educators to "think together about their underlying interests and ideologies" toward the goal of creating quality educational experiences for all students (Clark, 1999, p. 213). This inquiry-based thinking was the focus of our earlier research (Damore & Rieckhoff, 2019, 2021). In regards to teaching in a Montessori leadership preparation program, the use of case studies emerged as a tool to further facilitate critical, collaborative inquiry among graduate students and to continue our research. Houchens and Keedy (2009) espoused the framework of *theories of practice*, a process emphasizing the need for self-reflection in order to consider other perspectives as principals lead communities toward reflective practice in their schools. Houchens et al. (2017) further extended the research, suggesting school leaders' effectiveness requires subsequent willingness to alter their assumptions, values, and beliefs as they address complex problems and issues. Within the context of theories of practice, the individual contemplates alternative perspectives, which results in new action or direction. We situate case studies as an opportunity for Montessori leadership program faculty, and graduate

students attending such programs, to further reflect on their personal "theories of practice" and willingness to change their beliefs, and thereby take actions to improve their skills and practices in teaching and learning.

Design of the Study

This multi-method study relied on grounded theory to collect and analyze data and then posit our theory based on the patterns and insights within the data. The sampling strategy involved adult learners who had taken or taught a Montessori leadership course. They were invited to participate by informing on their experiences using case studies in their graduate courses and school-based experiences. Data was collected through electronic surveys and one-to-one interviews. Data analysis included a review of survey results and interviews.

Methods

This work is grounded in reflective practice for educators situated in courses with case studies in Montessori leadership preparation courses. The purpose of the study was to explore the use and effectiveness of case studies as teaching and learning tools in Montessori leadership programs. As noted, two key questions guided this study: 1) How does the use of case studies impact teaching in Montessori leadership courses? 2) How does the use of case studies impact student learning in Montessori leadership courses?

Participants

This multi-method study included program faculty who taught in Montessori leadership programs and currently enrolled graduate students in a university-based, doctoral-level Montessori leadership course. We began with identification of program faculty who taught leadership courses in Montessori teacher programs. We searched national Montessori organizational websites, verified information with the respective organizations, and identified 20 program faculty members from 14 Montessori leadership programs. The leadership courses are under the umbrella of Montessori teacher training programs, which are accredited by the Montessori Accreditation Council of Teacher Education (MACTE), which is authorized by the US Department of Education to accredit Montessori teacher education programs. Almost all of the programs are affiliated with a national Montessori organization such as Association

of Montessori International (AMI), American Montessori Society (AMS), or International Montessori Accreditation (IMC)/Montessori Foundation (MF), and adhere to organizational and curriculum standards for Montessori leadership preparation. Additional program participants included faculty from the doctoral-level Montessori studies program. Contact information for all program faculty was obtained through the respective programs' websites and online publications.

The second population identified for the study consisted of 13 graduate students (two cohorts) who had attended our Montessori leadership course at a large Midwestern university. Students' contact information was identified with class lists. The researchers taught a doctoral leadership course within a graduate program of Montessori studies. The course was held online, with alternate synchronous and asynchronous sessions throughout a full semester. Each asynchronous week included assignment of a case study to further engage discussion about theory presented the previous week.

Eleven of the 20 faculty members who were e-mailed completed the survey. Eight of 14 graduate students completed the survey. Response rates of 55% for faculty and 57% for graduate students were obtained. This response rate can be attributed to the tailored sampling of the study group, the personalized request from researchers, and added interest from faculty and graduate students to aid our research.

Surveys

The researchers developed survey questions by using standard criteria for question development. Criteria included open-ended questions, specificity, and clarity (Fink, 2002), and were based on previous formal and informal feedback through a pilot survey administered to Montessori program faculty members and graduate students who were not included in the study. Based on their feedback, a few minor modifications were made in the faculty survey, and none were made in the graduate student survey. Appendix A and Appendix B include the survey questions for program faculty and graduate students respectively. Using an anonymous, online survey, we wanted to determine how case studies were perceived and used by both program faculty and graduate students. Program faculty and graduate students were e-mailed surveys. Questions differed slightly between the two surveys, one focused on teaching with case studies and the other on learning with case studies. Numerous questions overlapped in content and intent. In addition,

Table 1.
Demographics—Program Faculty

Demographic	%
Position	
Program director	54%
Program instructor	27%
Guest lecturer	0%
Practicum supervisor	0%
Other	9%
Years in position	
Less than 2 years	9%
2–5 years	18%
6–10 years	27%
More than 10 years	45%
Primary Montessori organization affiliation	
AMI	9%
AMS	45%
MF/IMC	36%
Whole school leadership	9%

Table 2.
Demographics—Graduate Students

Demographic	Percentage
Position	
School administrator	38%
Curriculum director	0%
Lead teacher	25%
TEP program director	13%
TEP program instructor	13%
TEP guest lecturer	0%
TEP program practicum supervisor	0%
Other (TEP instructor and supervisor)	13%
Years in position	
Less than 2 years	13%
2–5 years	13%
6–10 years	38%
More than 10 years	38%
Primary Montessori organization affiliation	
AMI	0%
AMS	88%
MF/IMC	13%
Whole school leadership	0%

a request for an individual interview was included at the end of each survey.

Interviews

Our next step in the research methodology was to conduct follow-up interviews. We again reached out to the two populations—Montessori program faculty and graduate students—who had completed surveys and indicated their willingness to participate in a follow-up interview, which yielded four participants. Due to survey fatigue and brevity of comments that often accompany online surveys, we wanted to further clarify and obtain in-depth understanding with representatives from two samples regarding their perceptions of the use of case studies in their courses. Appendix C includes the interview questions asked of both groups of participants.

Survey Data Analysis

The surveys included quantitative and qualitative responses. Questions ranged from simple demographics to the use of case studies and perception of their effectiveness. The demographic questions asked respondents about their current position, years in the position, and Montessori affiliation. Table 1 provides the demographic information of program faculty, and Table 2 highlights demographic information of graduate students.

To summarize, faculty members served as Montessori leadership program directors (64%) and instructors (27%). The graduate students reported variance in their positions, such as Montessori school administrator (38%), lead teacher (25%), and Montessori Teacher Education Program (TEP) faculty (26%). Program faculty reported 64% in their respective positions for six years to more than 10 years. Graduate students reported 76% in their respective positions for six to more than 10 years.

Interview Data Analysis

The purpose of the semi-structured interviews was to further clarify and obtain in-depth understanding regarding perceptions of the use of case studies from both a faculty and student lens. Using a list of predetermined questions, we conducted the interviews within a month of survey completion. Four of the 19 individuals who completed the survey participated in the interviews (21%). Interviews were conducted with two program directors and two graduate students. The interview questions for the program faculty and graduate students

repeated several survey questions, providing more of a dialogue and asking for examples. An additional question was added to inquire about perceptions of the potential contribution of the use of case studies for mastery of competencies related to administrative leadership. We focused on the verbal narrative between ourselves and each faculty member (Gilbert, 2008). This interviewing method allowed for casual conversation, openness, candor, and spontaneous questions. Four of the 11 survey participants responded to our request for interviews. The four who participated in the interviews verified the survey findings and further enriched our understanding of the use of case studies in their courses.

Findings

Use of Case Studies

Following demographics, the survey question asked, "Do you use case studies in your leadership courses?" with "yes" or "no" answer choices and a stop on the survey for those who chose "no." Seventy-three percent of program faculty and 100% of graduate students responded "yes" and continued with the survey. In the follow-up interviews, program faculty and students reported that case studies are included in their course content either within the course or embedded as part of a learning module of the course. One interviewee, serving in a dual role as a faculty member and student, stated this:

> I have used case studies as both a student and instructor. As a student in undergrad, grad school, teacher education, and doctoral studies, different courses have leveraged case studies to add practical elements to the topics we are studying. I have always found case studies a beneficial way to practice theoretical skills in a practical application.

Topics for Case Studies

Program faculty were asked about the topics and case study situations they applied in the leadership courses they taught. This question allowed respondents to check all topics from a preset list the researchers offered. Topic choices were as follows: school leadership, communication, student situations, personnel challenges, parents/community, board governance, curriculum/including Montessori implementation, professional ethics, connecting theory to practice, conflict resolution, and collaborative leadership. Faculty reports three topics addressed in their case studies 67% of the time: student situations, school leadership, and personnel challenges.

Other topics, less often covered in their course case studies, reported at 56% of the time, include board governance, theory into practice, conflict resolution, and collaborative leadership. One respondent added the topic "creating a healthy workplace culture."

Graduate students were asked the same question about topics/case study situations presented to them in their program. In their survey, a briefer list of topic choices was presented: challenges with student(s), challenges with staff, challenges with parents, challenges with board, and curriculum issues/Montessori implementation. The students report these topics were most addressed in case study format in their coursework: challenges with staff (88%) and challenges with parents (75%). In hindsight, the researchers realize they might have had an improved opportunity for comparisons of faculty and students' responses if the same topic list had been used for both surveys. Yet, both populations identify case studies on personnel/staff challenges as the most covered topic.

Sources for Case Studies

Both surveys featured this open-ended question: "What are the sources for the case studies?" The question was designed to guide researchers to understanding the sources for case studies that Montessori program faculty were using in teaching and graduate students identified for use in coursework. In the survey, the program faculty responded with a range of sources, including case studies privately written and created from personal experience and experiences of others, to demonstrate real-life situations. Other sources were Montessori-specific from Montessori research and publications, and some were written using ChatGPT. Other sources of case studies were non-Montessori studies and articles, with sources such as the Center on the Developing Child at Harvard University and university publications. Listed sources represented authors of various texts, resources, and publications from various institutions and faculty creations. When graduate students were asked the same question about identifying sources of case studies used in their coursework, their responses included "class textbooks, and instructor-led case studies."

In the interviews, participants described the sources of case studies as "being written by instructors based on real events and/or created/developed by AI." Program faculty described their graduate experiences of using cases developed at Harvard and other institutions. This led to their choices to use them later as instructors of graduate courses. Other instructors have used vignettes/stories

Figure 1.
How are case studies used in courses?
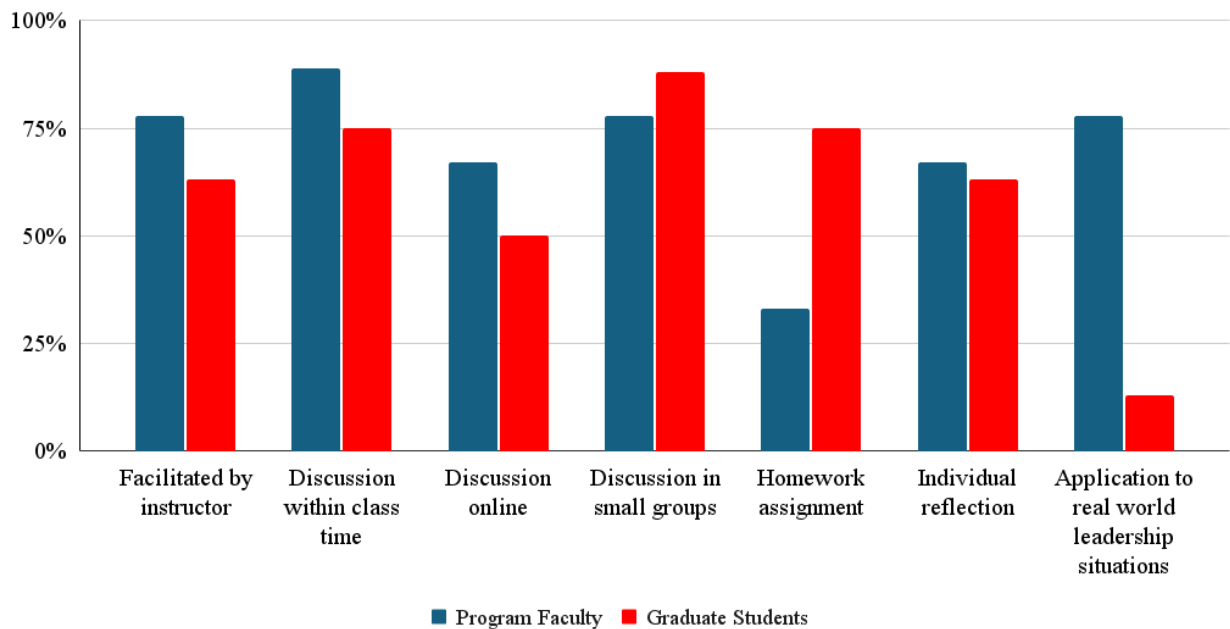
from personal experience. One faculty member shared the following: "I teach Classroom Leadership at a TEP, and I use stories from my own experience as a teacher and school administrator to have adult learners practice how they would handle a situation."

A student indicated different sources, sharing this: "Some courses have used case studies found in a textbook; other instructors have used vignettes/stories from their own experiences." In comparison with the program faculty, graduate students seemed to be more specific in listing textbook titles, although some overlap occurred.

How are case studies used in the courses?

Program faculty and graduate students were asked on the survey, "How are case studies used in the course?" Faculty selected from a predefined list, which researchers identified as common practices in use of case studies in teaching leadership concepts. Responses, as shown in Figure 1, included the following: facilitated by instructor (78%), discussion within class time (89%), discussion online (67%), discussion in small groups (78%), homework assignment (33%), individual reflection (63%), and application to real world leadership situations (78%). Graduate students responded to the same question from the same predefined list: "How are case studies used in the courses?" Responses included

facilitated by instructor (63%), discussion within class time (75%), discussion online (50%), discussion in small groups (88%), homework assignment (75%), individual reflection (63%), and application to real world leadership situations (13%).

In the interviews, participants were asked about faculty's use of case studies in coursework. One faculty member responded, "We [would] read them ahead of time and then break into groups and discuss. At residency the analysis is more complex, analyzing it in a more complex way."

A student replied, "Yes, I have usually had instructors explain that the case studies will allow us to practice skills that we have learned about in the course."

In the surveys, across the two groups there appeared to be closer agreement about use of case studies in small groups and less agreement about perceptions of use for individual reflection and application to real world leadership situations. The interviews gleaned positive feedback about use of case studies, referencing practicing skills learned in class and breaking into small groups for analyzing case studies.

Purpose of Case Studies

As Figure 2 shows, this question was asked on the surveys of both program faculty and students: "What were the purposes of the case studies? (check all that

Figure 2.
What are the purposes of case studies?
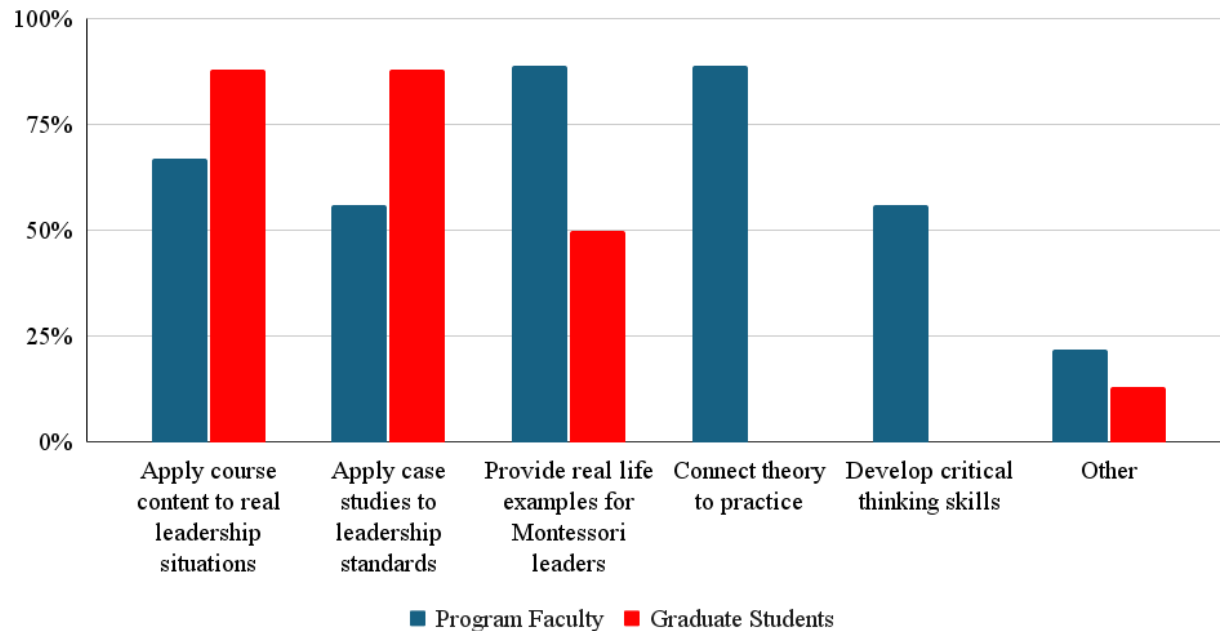
apply).” Faculty responded as follows: apply course content to real leadership situations (59%), apply case studies to leadership standards (56%), provide real life examples for Montessori leaders (89%), connect theory to practice (89%), develop critical thinking skills (56%), and other (22%). This was one faculty member's comment: “develop deep awareness, collaboration and seeing situations from differing perspectives.”

Graduate students' responses were as follows: apply course content to real leadership situations (88%), apply case studies to leadership standards (88%), provide real life examples for Montessori leaders (59%).

In the interviews, the question was modified as such: “Did you find that case studies were useful?” The faculty indicated that case studies are useful, as graduate students must “discern what is noise, what is truly important and what is distracting.” One student responded this way: “I have always found case studies useful to my learning. I like to take theoretical to practical applications. I feel that it makes me better prepared in my career to handle situations as they arise.”

Perceptions on purposes of the use of case studies varied significantly from faculty versus students. On the surveys, students rated the purpose of case studies higher than program faculty did with “application of course content to real leadership situations” and to “leadership standards.” Faculty rated the purpose of case studies

higher than students did on “providing examples for Montessori leaders.” “Connection of theory to practice” was rated high by program faculty, but that choice was not available to students. Although the question was modified from perceived “purpose to use” in the interviews, both faculty and students expressed usefulness with case studies in their coursework.

Student Receptivity to Case Studies

“Are the students receptive to the case studies?” To understand perceptions of program faculty versus students, the question appeared on both surveys with a simple choice of “yes” or “no” and a subsequent open-ended question: “why or why not?” Sixty-seven percent of program faculty responded “yes.” Answers to the open-ended question “why or why not?” include these comments from a faculty member: “Most find them [case studies] challenging and thought provoking; they prefer to receive them in advance with a study guide or question framework to prepare for discussion; real world practice; for my students it's often the first time they have participated in a case study and I have mixed results.”

The graduate students answered the same question, most responding “yes” (63%), and then commented as to “why or why not?” Comments from students include the following: “some, not all relatable”; “I enjoyed connecting the case studies to my own experiences and enjoyed the

Figure 3.
What do you think students learn from case studies?
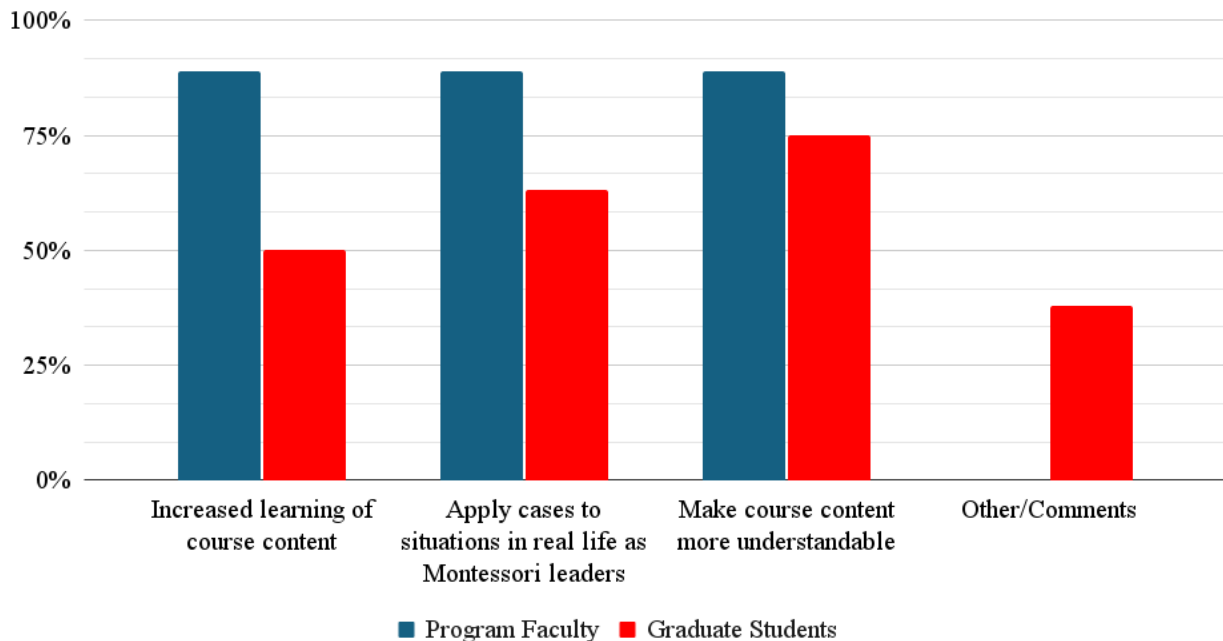
discussion with my peers"; and "the case studies helped me better see the application in real life situations."

In the interviews, one faculty member described initial difficulty in introducing case studies but segued into a positive experience:

> *At first, maybe a bit annoying and then some will see themselves or their situation in dysfunctional situations.… The adult students I taught this summer shared that case studies were one of their favorite parts of my Classroom Leadership course. They felt that it prepared them for situations that might arise in their own career and that they had a background understanding of how they might handle that situation.*

A second faculty member responded, "It is sometimes difficult to find appropriate case studies to use in teaching a course." On the question of receptivity, we found mixed perceptions among faculty and students on the "why or why not" of using case studies in Montessori leadership courses.

Student Learning from Case Studies

To understand the perceptions of program faculty versus students, the survey question on student learning—"What do you think the students learn from case studies?"—appeared on both surveys. Researchers offered three choices, a predetermined list. Respondents were told to check all that applied. Faculty responded as follows: increased learning of course content (89%), apply cases to situations in real life as Montessori leaders (89%), make course content more understandable (89%), other/comments (0%).

Students responded as follows: increased learning of course content (50%), applied cases to situations in real life as Montessori leaders (63%), make course content more understandable (75%). Students' survey comments (38%) include the following: "I learned a lot and my understanding increased by seeing the leadership skills (or lack of skill) in a real-life situation; getting to discuss the case studies online in the discussion form and within our group PODs [small groups asynchronous] was really interesting." "While we were discussing each scenario we often came away with different 'takes' on what happened depending on our current roles." "I learned that my perspective as a classroom teacher was sometimes different than the perspective of the heads of school when exploring the different case studies; I found that they were not applicable to my real-life situation, and mostly not at all applicable to Montessori challenges; it would be great to have case studies that are applicable to Montessori settings."

In the interviews, an additional question was added to enhance our understanding of student learning in context with leadership competencies: "Do you think case studies add to the competencies of administrative/leadership?"

One faculty member responded, "Absolutely. Seeing how an adult practices in a low-stakes environment is critical to understanding how they would perform in a more stressful, high-stakes situation."

Another faculty member shared, "They [students] get more confident in how to more systematically tackle a complex problem."

A student shared this perspective: "Many times, in the Leadership course at UWRF [University of Wisconsin – River Falls] during our pod meetings, we shared stories about what was happening in our careers and helped one another brainstorm how to handle the situation."

The data indicated a difference in perceptions between faculty and some graduate students on the learning benefits of case studies in Montessori program coursework. For example, in the survey, a significant difference emerged between faculty perceptions (89%) versus student reporting (50%) about increased learning of course content. The additional interview question and subsequent answers appeared to reinforce that learning through use of case studies includes added competencies of administrative/leadership.

Discussion

Our study included two research questions: *How does the use of case studies impact teaching in Montessori leadership courses? How does the use of case studies impact student learning in Montessori leadership courses?*

Our surveys and interviews led us to new perspectives and findings about use of case studies for teaching and learning in Montessori leadership programs. With the survey responses, program faculty and graduate students alike acknowledged several benefits and challenges of using case studies for coursework. In the surveys, they identified topics addressed in the case studies assigned. Their responses aligned with our review of literature on benefits and challenges of case studies used in higher education and educational leadership programs (Chumak et al., 2022; Mahdi et al., 2020). A review of three well-known case study books (Hanson, 2008; Kowalski, 2008; Midlock, 2011) includes many of the same topics our survey participants identified, such as school leadership as well as communication and

challenges with staff, students, and parents. Sources for the case studies ranged from teacher-generated cases to material presented from assigned texts.

Across the two groups of survey participants, there appeared to be closer agreement about the use of case studies in small groups and less agreement about perceptions of impact on individual reflections and application to real world leadership situations. Students rated the purpose of case studies higher than did program faculty with application of course content to real leadership situations and application of case studies to leadership standards. Program faculty gave a high rating to the connection of theory to practice. Even though this choice was not available on the survey for students, their comments implied the connection of theory to practice. The purpose of the use of case studies appeared to vary significantly in the perceptions of faculty versus that of students. Referencing application of course content to real leadership situations and to leadership standards, students rated the purpose of case studies higher than did program faculty. Faculty rated the purpose of case studies higher than did the students for "providing examples for Montessori leaders." Connection of theory to practice was rated high by the program faculty, but that choice was not available to the students. On the question of receptivity, we found mixed perceptions among faculty and students on the "why or why not" on the use of case studies in Montessori leadership courses. This may have implications for program faculty and be of more interest in future research.

Different perceptions emerged between program faculty and some graduate students on the learning benefit of case studies in coursework: 89% for program faculty and 50% for students on the question related to "increased learning of course content." An additional interview question and subsequent answers appeared to reinforce that learning through the use of case studies includes the benefit of added learning competencies of administrative/leadership. Perhaps more investigation is warranted, or on a practical level, a closer examination of the methods used by the faculty. Reframing the purpose of case studies with intentionality and assessing case study use in courses may be advantageous in strengthening student perceptions of value and benefit of the use of case studies. As found in the literature review, the responsibility of the instructor is to ensure a clear presentation of the case study and to state clear guidelines (Nilsson, 2017). Then, responsibility turns to the participant's level of accountability, preparedness, and

willingness. Nilsson (2017) concludes that a combination of these strategies must be taken into consideration when teaching and learning with case studies.

Trustworthiness and Limitations

Credibility of data is paramount in research and drawing conclusions. Glesne (2011, p. 49), in *Becoming Qualitative Researchers*, underscores the concept of trustworthiness to increase the credibility of data and findings in qualitative research: "trust the culture and check out your hunches." We acknowledge the limitations and potential biases in this study. One researcher's Montessori background, knowledge, and experience proved helpful in developing the survey and interview questions, yet possibly formed a bias toward the use of case studies for Montessori leaders. Limitations occurred with regard to participants' self-reporting as well as our interpretations as we present the data (Glesne, 2011). The study included a small sample and limited generalizability. For the program faculty and graduate students, variances in roles and participation in various Montessori leadership programs throughout the country might also serve as biases to participant responses. Our survey design and questions might have been improved had we designed the two surveys in direct alignment of the questions we asked. We recognize the small sample size of the interviewees, taking that also into consideration.

Implications

Case studies can provide a powerful tool to elicit discussion and leadership learning via analysis and problem-solving outside of one's own setting. Given the current delivery of coursework through a variety of modalities and often accelerated learning modules, we believe the use of case studies lends a necessary aspect of leadership learning that cannot otherwise be replicated and provides necessary links from theory to practice. The opportunity to merge critical learning and reflection is a key element for both faculty and students. The case study allows student practice in perspective-taking, seeing a problem from another person's perspective, which is part of leadership learning as students move from teacher perspective to leader perspective. According to Galinsky (p. 59), perspective-taking is "the ability to see the world from the perspective of others and is a critical skill for leaders." Perspective-taking involves understanding another's point of view and emotions, whereas empathy

requires feeling another's emotions. We believe case studies provide the opportunity for future opportunities to understand this shift from the teacher to the leader perspective. The study left us interested in examining in our future research the concept of perspective-taking on leader reflection.

Maria Montessori advocated reflection about practice, so we are extrapolating that case studies may be a powerful and effective extension of scholarly study of theory to connect applied practice. However, these benefits may not be well clarified or highly valued in Montessori leadership coursework. This conclusion has implications for program faculty when using case studies in these respective programs and courses. Robertson and Muirhead (2017) concluded that purposefully designed case studies supported critical reflection in higher education. We situated the study of the use of case studies as an opportunity for program faculty members to engage in collaborative, critical inquiry and reflect about their personal "theories of practice." (Houchens et al., 2017). We believe the findings might compel Montessori program faculty to more deeply reflect on the effectiveness of using case studies for teaching and learning. As well, we think graduate students might have opportunities to better reflect on their perceptions of the use and value of case studies encountered in their coursework. And the insights would give us, as university researchers and instructors, reflection and improved practice when using case studies.

For practical purposes, we have learned it may be optimal for Montessori program faculty to better frame the purpose, use, and value of case studies for the Montessori student audience, integrating and translating Montessori language and standards with current mainstream educational lingo. With the use of case studies in Montessori leadership coursework, an opportunity exists for faculty to reflect on strategies for using case studies and best practices—for example, emphasis on facilitation and explanation of purposes of use of case studies as an instructional strategy and evaluation of case studies as follow-up. Students may require additional training to familiarize with current educational leadership standards and how those directly connect to and impact their work, regardless of Montessori organizational context. Students need to feel more comfortable in translating why and what they are learning by using case studies, assimilating, accepting, and looking through a leadership lens, not just a Montessori lens.

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Appendix A
Survey Questions for Program Faculty

Your position
- Program Director
- Program Instructor
- Guest Lecturer
- Practicum Supervisor
- Other _____

How many years in your position?
- Less than 2 years
- 2–5 years
- 6–10 years
- More than 10 years

Your primary Montessori organization affiliation
- AMI/USA
- AMI
- AMS
- MF/IMC
- Whole School Leadership
- MACTE Independent
- Other _____

Do you use case studies in your leadership/administrator training? If you respond no to this question, you can stop at this point in the survey
- Yes
- No
- Other

What are the topics/case study situations you have used in your teaching in leadership or administrative training? Check all that apply.
- School leadership
- Communication
- Student situations
- Personnel challenges
- Parents/community
- Board governance
- Curriculum/including Montessori implementation
- Professional ethics
- Connecting theory to practice
- Conflict resolution
- Collaborative leadership
- Other _____

Can you rank order your top three case study topics? 1 is the topic most used in case studies, 2 is the second most used in case studies, and 3 is the third most used in case studies. You can click on the topic and move it into the correct spot.

- Communication
- School leadership
- Student situations
- Personnel challenges
- Parents/community
- Board/governance
- Curriculum (including Montessori implementation)
- Professional ethics
- Connecting theory to practice
- Conflict resolution/decision-making
- Collaborative leadership
- Other

What are the sources for case studies? Please list any publishers/sources known that you use, such as Bolman & Deal, case studies/vignettes with unknown authors.

How are the case studies used in the course? (Check all that apply)
- Facilitated by instructor
- Discussion within class time
- Discussion online
- Discussion in small groups
- Homework assignment
- Individual reflection
- Application to real world leadership situations
- Other _____

What are the purposes of the case studies? (Check all that apply)
- Apply course content to real leadership situations
- Apply case studies to leadership standards
- Provide real life examples for Montessori leaders
- Connect theory to practice
- Develop critical thinking skills
- Other _____

Are students receptive to the use of case studies?
- Yes
- No
- Why or why not_____

What do you think students learn from case studies? (Check all that apply)
- Increased learning of course content
- Apply cases to situations in real life as Montessori leaders
- Make course content more understandable
- Other/Comments

Survey Questions for Graduate Students (Adult Learners)

Your position (Check one)
- School Administrator
- Curriculum Director
- Lead Teacher
- TEP Program Director
- TEP Program Instructor
- TEP Guest Lecturer
- TEP Practicum Supervisor
- Other _____

How many years in your position?
- Less than 2 years
- 2–5 years
- 6–10 years
- More than 10 years

Your primary Montessori organization affiliation
- AMI/USA
- AMI
- AMS
- MF/IMC
- Whole School Leadership
- MACTE Independent
- Other_____

In which doctoral courses have you used case studies?
List courses here:

What were the topics/case study situations that you were assigned in our UWRF course or other leadership courses you have attended? (Check all that apply)
- Challenges with student(s)
- Challenges with staff
- Challenges with parents
- Challenges with board
- Curriculum issues (with Montessori implementation)
- Other_____

What are the sources for case studies? Please list any publishers/sources known that you use, such as Bolman & Deal, case studies/vignettes with unknown authors.

How were the case studies used in the course? (Check all that apply)
- Facilitated by instructor
- Discussion within class time
- Discussion online
- Discussion in small groups
- Homework assignment
- Individual reflection
- Application to real world leadership situations
- Other_____

What were the purposes of the case studies? (Check all that apply)
- Apply course content to real leadership situations
- Apply case studies to leadership standards
- Provide real life examples for Montessori leaders
- Other_____

Were you receptive to the use of case studies?

- Yes
- No
- Why or why not _____

What did you learn from using the case studies?
- Increased learning of course content
- Apply cases to situations in real life as Montessori leaders
- Make course content more understandable
- Other/Comments

How would you rate the use of case studies in MONT814 last year? Rate on a scale of 1–5 with 1 as lowest and 5 as highest.
- 1
- 2
- 3
- 4
- 5
- Comments

Appendix C
Interview Questions for Program Faculty and Graduate Students (Adult Learners)

Interview Questions for Program Faculty

1. What are your experiences using case studies in your teaching?
2. What is your source(s) if you are using case studies?
3. Are case studies useful to your teaching and if so, how? If not, why not and what would have made them useful?
4. Do you clarify the purpose of using case studies in your courses? And what does that look like?
5. What do you think students (adult learners) say about the use of case studies? Can you give an example?
6. Do you think case studies add to the competencies of administrative candidates in your courses? Can you give an example?
7. Do you think students are capable and willing to develop their own case studies in courses?
8. Is there anything else regarding case studies for teaching and learning tools we should be aware of?

Interview Questions for Graduate Students (Adult Learners)

1. What are your experiences using case studies in your coursework, either university-based or other (TEPs, professional development)?
2. What is your source(s) if you are using case studies? (publisher, textbooks, vignettes/stories from the instructor, for example)
3. Are case studies useful to your learning and if so, how? If not, why not and what would have made them useful?
4. Does the instructor clarify the purpose of using case studies in your courses? And what does that look like?
5. What do you think students (adult learners), in general, say about the use of case studies? Can you give an example?
6. Do you think case studies add to the competencies of administrative/leadership candidates in your courses? Can you give an example?
7. Do you think students are capable and willing to develop their own case studies in courses?
8. Is there anything else regarding case studies for teaching and learning tools we should be aware of?