



Mortarboard Review: Montessori-Related Dissertations, 2024

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Each year, doctoral students around the world complete their programs in higher education by writing and defending their dissertations. These students have completed a significant project that results in a thoroughly researched manuscript. Unfortunately, these papers are not widely indexed and may be stored only within institutional repositories or databases devoted solely to dissertations and theses. This process limits exposure of these manuscripts to other scholars, yet many of the works offer valuable contributions to the field. This article is part of an annual series that spotlights the previous year's doctoral dissertations that are relevant to the field of Montessori education and research. This article highlights three of the 21 dissertations considered from 2024 (see the Appendix for a list of all 21 dissertations considered).

As with the previous review in this series, the authors began the selection process with a search across databases and repositories with national and international coverage of dissertations and theses: EBSCO Open Dissertations (<https://opendissertations.org>), Networked Digital Library of Theses and Dissertations (NDLTD, <http://search.ndltd.org>), Open Access Theses and

Dissertations (OATD, <https://oatd.org>), and ProQuest Dissertations and Theses Global (PQDT, <https://www.proquest.com>). The authors compiled a list, which yielded 21 unique dissertations, all written in English, from the 2024 calendar year. Our evaluation excluded any subsequently published dissertations (e.g., article, book), and each dissertation was evaluated on its own merit regardless of the university's status (e.g., nonprofit/for-profit, public/private, religious/secular).

The dissertations were broadly analyzed to determine if any common themes or other commonalities emerged across the collection. The results of this exercise revealed that the works focused on the following: (a) practices of Montessori educators, (b) teacher training, (c) public Montessori schools, and (d) reading development and aptitude. Given this, we decided to review three works we consider to be particularly relevant and timely. Here is a brief introduction to them: Heather Gerker explored the concept and practice of policy advocacy among Montessori teachers and leaders; Courtney Reim examined the extent to which Montessori teachers practice "scientific observation" (SO) and "scientific

observation for assessment” (SOFA); and Sharra Weasler proposed a new model for reading development and reading motivation specific to the Montessori early childhood classroom (primary level). Reviews of these three dissertations are included below.

Gerker, H. (2024). “Why aren’t we speaking up?”: A mixed methods study on the political efficacy and advocacy engagement of Montessori teachers [Doctoral dissertation, University of Cincinnati].¹ <https://www.proquest.com/dissertations/docview/3156392450>

Education in the United States is a complex system, governed by school, district, state, and federal policies. Teachers have the responsibility of navigating this complex system within their classrooms at the level of implementation with students. Within Montessori education, as argued by Heather Gerker in her 2024 dissertation, teachers face not only policy challenges common to all teachers, but also additional challenges when educational policies do not align with the nature of the Montessori pedagogy. Gerker’s study sought to understand how Montessori teachers respond to education policies and how (if at all) they engaged in policy advocacy at local, state, or national levels. Gerker also sought to understand from teachers what they would need in order to speak up for or against policies that shape their Montessori pedagogy.

Gerker’s explanatory sequential study was carefully designed, based on the research foundations of Gerker’s personal experiences, her philosophical worldview of critical realism, her mixed-methods and participatory action methods, and a conceptual framework that integrated street-level bureaucracy (SLB), sensemaking theory (ST), and relational cultural theory (RCT). These frameworks were woven together, each providing important lenses through which to view the problem and the data. Gerker utilizes Lipsky’s (2010) theory of SLB, as a frame for understanding teachers as the ones who are “directly engaged in policy delivery at the front lines” (Brodin, 2015, p. 30). ST, as Gerker explains, “provides a framework for understanding how people act in response to their meaning making [and] clarifies why people may give different meanings to the same event or the same meaning to different events” (p. 19). Finally, RCT argues that mutually empathetic connections and growth-fostering relationships support human

development throughout life, and that these growth-fostering relationships can promote increased self-worth, increased capacity for creativity and productivity, and other positive outcomes. Therefore, relationships between Montessori teachers, between teachers and administrators, and between teachers and policymakers can impact the engagement, self-worth, and productive action of teachers, either positively or negatively.

Gerker’s framing of her study in this way is both novel and impressive to this reviewer, setting up an approach that involved multiple steps over time, but which consistently centered the voices of teachers, whom Gerker describes as “the forgotten citizens” of the policymaking process (p. 5). While this review provides an overview of the study, it should be noted that not every aspect of the research questions or findings can be included within the space constraints of this article. Thus, this reviewer has attempted to provide a summary of some of the most interesting, novel, or salient points of the study.

In the first phase of the study, Gerker surveyed 125 Montessori teachers to measure their teacher political efficacy (TPE). From analysis of the survey data, Gerker identified a subset of 33 participants with whom to engage in participatory research, utilizing the Group Level Assessment (GLA) methodology. Engagement focused on their experiences with policy and advocacy, seeking to more deeply understand which conditions and strategies support teachers in navigating policies that impact their Montessori pedagogy and to identify what supports might these teachers need for future policy advocacy. Gerker successfully recruited a wide sampling of Montessori teachers from 24 states and the District of Columbia. This group was diverse in gender and ethnicity, served in public and private schools, represented a range of prior teaching experience, and worked with children and adolescents of various ages. The participants skewed overwhelmingly female and white, and although this is noted as generally representative of the teaching force in America, Gerker also notes that she intends for future studies to broaden the diversity of participants, so that in particular non-white perspectives might be amplified.

In phase one, Gerker utilized the TPE, which offered 20 seven-point Likert scale questions to measure internal, external, and collective political efficacy. Internal political efficacy measures assessed the degree to which participants felt they could personally understand and engage in political activities such as advocacy. External political efficacy measures assessed the degree to which

¹Reviewed by Joel Parham

participants felt the political system was responsive to their individual needs and concerns. And collective political efficacy measures assessed the degree to which participants felt the system would be responsive to collective efforts of people to demand change. The survey also included an eligibility check, a section for open-ended responses, and demographic questions.

Findings from the analysis of the stage-one survey included that participants in phase one were distributed across low, medium, and high levels of political efficacy across all subscales. Internal political efficacy scores were mostly in the medium range, external political efficacy scored mostly in the low range, and collective political efficacy scores were mostly in the medium-high range. In addition, teachers who had 10 or more years of teaching experience scored significantly higher for external political efficacy than did participants who had less than 10 years of teaching experience, but there was no significant difference between these two groups in terms of internal or collective political efficacy scores. There was also no significant difference between public school teachers and private school teachers on any of the three subscales of political efficacy.

In the second phase of the study, in keeping with Gerker's commitment to center teachers' voices and perspectives, the collaborative GLA research method was utilized to generate, analyze, and prioritize ideas with participants. This happened both synchronously and asynchronously, with 33 participants in the asynchronous phase participating via collaborative online content-sharing platform Padlet, and eight participating in the synchronous phase via online videoconferencing platform Zoom.

Gerker analyzed data from phase one to present five themes to participants of phase two: "1) lack of understanding or trust of Montessori education, 2) external policies do not support the Montessori pedagogy, 3) teacher engagement with policies, 4) mandated assessments and standards, and 5) role of administration" (p. 74). Using Padlet, participants responded to prompts about those themes, generating 288 responses. For the synchronous phase, participants reviewed the Padlet responses, adding comments or expressing agreement with prior comments. Participants were then paired and assigned a set of Padlet prompts to discuss in a breakout Zoom room. As pairs, participants discussed any initial reactions and generated three to five themes or patterns spanning the prompt responses.

After the small group discussions, whereby themes were recorded into a shared Google Doc, participants

returned to the main Zoom room to select most prominent themes and determine action steps. From this whole-group discussion, teachers prioritized three themes: "1. Teachers are overstretched. We need time and space dedicated to understanding policies. 2. Teachers do not know enough about policymaking processes or systems to know what to do when policies do not work with our pedagogy. 3. Teachers need access to funding, to the policymakers and to the policymaking process" (p. 79). Unfortunately, the remaining meeting time for brainstorming action steps was extremely limited, so only a few quick suggestions emerged. They included a desire for a simple and plain language course on policy, and a desire for support and time to advocate for themselves.

Gerker completed a secondary analysis of the generated data, findings of which were integrated with participant-generated themes and open-ended responses from the survey in part one, to develop a draft of themes and recommendations which were also shared back to participants for member-checking. In the end, phase two resulted in three major themes, each expressed from the teachers' points of view: "1) We are overstretched and need support. 2) We are not explicitly taught about policymaking processes or systems. 3) We need access to funding and access to policymakers and the policymaking process" (p. 97).

Each theme also had a number of subthemes, and relevant recommendations. Not all participants agreed fully with all recommendations—for example, one recommendation was for policy education to be included in Montessori teacher training, but others disagreed that such placement would be helpful or appropriate. Nevertheless, the full list is illuminating, with lessons for administrators, teacher education programs, districts, and national Montessori organizations. Salient recommendations from teachers on what would best support them in advocating for Montessori education include dedicated time away from the classroom for advocacy, training and professional development specific to policy, and funding for accreditation and teacher training.

Gerker concludes the study with a strong and thoughtful discussion of where she found some of her assumptions to be incorrect, as well as ideas for how to continue supporting teachers as the primary implementers of (yet often overlooked contributors to) educational policy.

Although no study is without its limitations and shortcomings, Gerker's well-designed study is successful in not only uncovering some of the barriers Montessori

teachers may face as policy advocates—including a lack of *understanding* (about educational policy and the policy-making process) and *time* to learn about and then to participate as advocates in shaping policy—but it is also highly successful in centering teachers’ voices. Gerker’s dissertation is detailed, giving credibility to each step of the process and her conclusions. As the first (and so far only) study examining the political efficacy of Montessori teachers, Gerker makes an important contribution to the field. This reviewer hopes Gerker and others will continue to expand and refine this line of inquiry, so Montessori teachers do not remain “forgotten citizens” of the policymaking process.

Reim, C. (2024). *Montessori teacher dispositions: A mixed methods exploration of scientific observation for assessment* [Doctoral dissertation, University of Hartford].² <https://www.proquest.com/docview/3106824755>

Courtney Reim’s study aimed to analyze Association Montessori Internationale (AMI) teachers, specifically those trained teachers for the 3–6 age group, self-reporting their understanding and practice of scientific observation (SO), and SO as a disposition and disposition in action (DIA), to better identify Montessori teachers’ application of scientific observation for assessment (SOFA). Her intent is to contribute literature regarding SOFA in Montessori settings due to the paucity of existing literature in this space as well as the area of research in DIA of teachers in Montessori settings. Reim emphasizes this study is significant because much of what is believed about observation in Montessori settings is anecdotal.

Reim anchored her study in the framework of the Montessori trinity (Montessori, 1989)—the child, the environment, and the adult—and relied on the conceptual framework, dispositions, and theory of DIA (Thornton, 2006) to frame her research questions. The data was gathered to inform the primary research question: RQ1. *What do Montessori Teachers with an AMI teacher credential for students ages 3–6 years in the United States report regarding the application of SOFA?* These two sub questions were also posed: RQ2a. *What do Montessori Teachers with an AMI teacher credential for students ages 3–6 years in the United States report regarding SO as a disposition?* RQ2b. *What do Montessori Teachers with an AMI teacher credential for students ages 3–6 years*

in the United States report regarding SO as a DIA? (p. 14). Reim adapted existing SO and SOFA assessment tools. This will benefit future research as it builds upon existing SOFA literature in the field and includes nontraditional pedagogies such as Montessori teaching.

Reim indicated that a dearth of literature focuses on SO, DIA, and SOFA in the context of Montessori pedagogy, teachers, and training, or has been measured or assessed in Montessori settings. She provided comparable literature to extend the understanding of how SO, DIA, and SOFA extend into Montessori settings. Her focus for the literature included these four areas: Data-informed Practices, Scientific Observation, Teacher Disposition, and Novice-Expert Paradigm. I appreciate that Reim included in the literature how education policy has influenced this field of study and each of these themes. Most notably discussed were the accountability practices for the No Child Left Behind Act (Ellis, 2007) and teacher disposition as a standard for accreditation with the Council for the Accreditation of Education Preparation (CAEP).

Montessorians are informed in training about the importance of observation in the work to “follow the child.” Reim links this Montessori training message to the contemporary understanding of the practice of SO—that observation and SO can be a teacher’s DIA and the act of observation, and can cumulatively be determined as SOFA. I found the literature in the methods section could have been expanded to discuss reliability and validity of the tools chosen, as well as why each tool was chosen and how it was adapted. There is no reference to the actual tool to make a comparison as to how the tool was adapted and how the adaptation maintained reliability and validity as a tool. Some statements were made without reference, such as comments about historic tensions, the “othering” (p. 4) of Montessori pedagogy, and assumptions of others’ misunderstanding of Maria Montessori’s work and gender issues. Literature to support these claims would be expected. Reim created a section in her literature to explore the Novice-Expert Paradigm. This section is interesting but missed the opportunity to inform readers of the survey results. The section lacked a definition of “expert” or what Reim would deem as expert for this study, and how the findings influenced this decision or vice versa, and how the definition influenced her interpretation of the findings based on the survey questions and years of experience of participants. It was not a point of Reim’s study, but a recommendation for further study to examine the correlation of years of

² Reviewed by Katie Keller Wood

experience with the results of Montessori teachers' DIA instrument scores would have been valuable.

Reim designed exploratory descriptive research using a convergent mixed method collecting data in parallel, analyzing separately and merging for interpretation. The study incorporated a national survey and an embedded mixed methods case study, using a survey, interviewing rubric and protocols, and Montessori teacher observation checklist, all of which Reim developed for this study. She designed several tools since no applicable tools existed. These included the following: (a) a survey, (b) an observation checklist, (c) an interview protocol, and (d) a rubric. The survey is labeled the Montessori Teacher-Scientific Observation Disposition Scale (MT-SODS); however, neither the methods section nor the appendix shed light on what was adapted or adopted from the original survey, the Teacher Educators' Researcherly Disposition Scale (Tack & Vanderlinde, 2016). The observation checklist or DIA rubric is adapted from a similar tool developed by Thornton and Strahan (2004). No reference is made to what was adapted or adopted to create the tool of this study. The specifics of the interview protocol are not included in the methods or appendix. It is unclear if the protocol was a script, guidelines, or framework. The study states that the interview was coded; however, there is no appendix to outline the coding of the interview responses to the dispositions or DIA assessment tool. Due to the small n value for both participants for the survey and one case study, this dissertation is a starting point for ongoing research and discussion but should not be generalized for the greater Montessori community.

Reim concludes from her findings that Montessori teachers with an AMI credential for students ages 3–6 in the United States report application of SOFA existed with some degree of predefined aims and objectives, and reported the application of SOFA was related to system challenges for developing and sustaining SO procedures. Based on the results, her recommendations include practice for Montessori teachers, Montessori teacher preparation programs, and how to expand this area of research.

Despite my personal assessment of the additional needs to bolster the literature review and understanding of the process of the self-developed assessment tools for the study, I believe Reim's contribution to the SOFA literature creates new opportunities for further analysis and research in this area. While her focus is on the Montessori teacher trained for the 3–6 group, this study

is applicable to all Montessori age groupings. Reim's statement that understanding how observation informs the Montessori practice of "following the child" in the environment with fidelity—and how this can inform the process of SOFA—was crucial to bring each piece of the study together. Specifically, she states, "The practice of SOFA enables Montessori Teachers to guide the child to activities that support the work of self-construction." (p. 5).

Weasler, S. (2024). *A grounded theory exploration of learning to read in the Montessori early childhood classroom: Using teacher knowledge and experience to build a model of reading development and to examine how Montessori pedagogy supports reading motivation* [Doctoral dissertation, University of Northern Colorado].³ <https://digscholarship.unco.edu/dissertations/1111>

In this study, Sharra Weasler sought to construct a new model of reading development concerning practices in Montessori early childhood classrooms. She conducted interviews with seven educators and made observations in one classroom. This data was gathered to answer three research questions: (1) What is the process by which children learn to read in a Montessori early childhood classroom? (2) How does the Montessori language curriculum support the process of learning to read? and (3) How does the Montessori Method support the process of learning to read? (pp. 12–13). Ultimately, the model she created is similar in many ways to existing models regarding the process of learning to read; however, her model is specific to Montessori environments. This is novel because it opens the door to future research in this area.

Regarding the first research question, she asserted that educators she interviewed identified "four lines of skill development and two lines of skill application" (p. 110). Accordingly, skill development included the following: (1) domain-neutral skills and attitudes, (2) oral language, (3) metalinguistic awareness, and (4) symbol-sound association. Weasler defined these terms as follows: Domain-neutral skills and attitudes are generally understood to be "concentration and attention span, motivation, and memory"; oral language encompasses "vocabulary and background knowledge and conversation skills"; metalinguistic awareness includes "phonemic awareness and semantic awareness";

³ Reviewed by Claudine Campanelli

and symbol-sound association involves “memorizing the phonemes that match the visible letters or groups of letters” (pp. 110–111). As for skill application, Weasler asserted this included (1) encoding (building words) and (2) decoding (translating the written or spoken word into meaning). Referencing details from interviews with Montessori classroom educators and in-classroom observations, Weasler clearly communicates how her data supports the existence and necessity of these skills for reading.

Weasler’s second research question establishes that a formal “Montessori curriculum” does not exist—neither the Association Montessori Internationale (AMI) nor the American Montessori Society (AMS) have defined a curriculum package. Thus, Weasler makes the distinction that curriculum, as related to this question, refers to “the classroom materials and structured activities” (pp. 124–125). This definition may seem overly broad, but it encapsulates the entire Montessori classroom, which serves as an environment that has specific materials and activities designed to aid in a child’s holistic development. This section of her dissertation is rich with descriptions of different aspects and activities found in a Montessori classroom. These descriptions include details about various elements of the curriculum and how they contribute to the reading development process. Using data and findings pertaining to research questions one and two, Weasler created her Four Strand Reading Braid (p. 164)—a new model of the process for learning to read in the Montessori early childhood classroom (more details below).

In her third and final research question, Weasler relies on data from classroom observations and interviews to examine how the Montessori Method supports the process of learning to read. Her classroom observation, as previously indicated, consisted of observations in one classroom. Though this is a very small sample size, she used semi-structured interviews to validate or challenge her observations. As Weasler notes, “There were strong similarities across the interviews, corroborated by my classroom observations, which enabled me to construct the data-based model of the Montessori pedagogy” (p. 170). I do not elaborate here, but her model of the Montessori pedagogy and the accompanied description may be of particular value to other researchers (pp. 171–172).

With the scope and focus of Weasler’s study outlined above, I turn to a brief analysis of her literature review. She comprehensively covers the body of science of reading (SOR) research, noting that most of this research

has employed quantitative methods, establishing the necessity of qualitative research in this area. Her review of the SOR research acknowledges conflicting findings among studies (pp. 55–57) and that most of this research “is conducted by neuroscientists and behavioral scientists who have no classroom experience” (p. 58). She also notes that several literacy instruction studies have demonstrated how educators emphasized social development over literacy development in the early years (p. 62). As Weasler puts it, these studies “indicate that the priority that [educators] place on literacy instruction may be increasing, [yet, educators] still lack knowledge and skills when it comes to literacy instruction, and quality curriculum and professional development can improve [educators’] classroom practice” (pp. 62–63).

In her evaluation of Montessori-related reading studies, Weasler acknowledges that scholarly research in this area is small but growing. Though Weasler’s findings are generally accurate, it’s worth noting that some Montessori-related research is overlooked in her review and she also potentially overemphasizes research by Angeline Lillard. Although Lillard is a top researcher in the Montessori field, not included are other works that would have been a welcome inclusion and could have established a broader foundation, context, and necessity for the study (e.g., Denervaud et al, 2020; Patel, 2012; Richardson, 1997; Thompson, 2024; Zoll et al, 2023). A review of works by Montessori practitioners describing their classroom experiences pertaining to reading or literacy development would have been a welcome addition as well. Though not a substantial error, Weasler inaccurately identifies the setting of the study conducted by Denervaud et al. (2019) as Helsinki, Finland—it was actually Geneva, Switzerland, with Swiss schoolchildren. Weasler declares that “there is no research focused on the process of learning to read in the Montessori early childhood classroom” (p. 65), but this statement seems tenuous given the brief list of Montessori-related reading studies listed in parentheses above.

As noted here, her literature review has some shortcomings; however, she sufficiently establishes her study’s context and necessity. While these facts should not be interpreted as a disqualification of Weasler’s study, they are noteworthy. A broader review of Montessori-related scholarship concerning reading and literacy in the Montessori environment may have established a stronger foundation for the study.

Moving on to the substance of the study, some studies related to literacy and reading development in the Montessori classroom have been conducted, but the

quantity is limited. Given this, Weasler “believed a new theory of learning to read, which is based on a systematic study of the [reading development] process as a whole, was needed,” and she boldly asserts, “This dissertation is the first systematic study of how reading develops in the Montessori classroom” (p. 81). While this claim—“first systematic study”—is a questionable distinction, a study of this kind is novel, necessary, and timely, particularly given the reading scores in the most recent The Nation’s Report Card (National Assessment of Educational Progress, 2025). Weasler sought to construct her model through a qualitative case study relying on interviews, observations, and photos captured from AMI-trained primary-level educators (p. 13).

Weasler “integrated the findings” from the first two research questions to construct her model—the Four Strand Reading Braid (p. 164)—which, while not explicitly acknowledged, appears to be a derivation of Scarborough’s Reading Rope (International Dyslexia Association, 2018; Scarborough, 2001) blended with elements from SOR models. Weasler’s introduction of a new model of learning to read in the Montessori early childhood classroom is novel; however, a discussion about the relationship between her model and Scarborough’s is absent. This would have been a welcome discussion, but its absence opens up an opportunity for further evaluation. Despite this, Weasler compares her Four Strand Reading Braid model with SOR-based models (pp. 217–219). In doing so, she highlights how the Four Strand Reading Braid is more comprehensive, and relies on qualitative measures as opposed to quantitative. Weasler reviewed SOR models such as the Simple View of Reading (SVR) and the Active View of Reading (AVR) models, as well as some other derivations, but emphasizes that these are based on quantitative data. She claims her Four Strand Reading Braid “is not based on the SVR,” yet her model appears to be partially based on a derivative of the SVR—Scarborough’s Reading Rope.

Despite these critiques, Weasler’s work is a welcome contribution to scholarship concerning reading and literacy development within the Montessori early childhood classroom (primary level), particularly since it relies on qualitative data. Additionally, her model—the Four Strand Reading Braid—is valuable as it constructs a visual representation of the process of reading development specific to the Montessori classroom. This model and its relation to existing models of reading development in early childhood classrooms enables

future research to evaluate conventional and Montessori classrooms from new and different perspectives.

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Appendix: List of 2024 Dissertations Considered

- Afroz, F. (2024). *Preschool teachers' self-efficacy in teaching mathematics: A multiple holistic case study approach* [Doctoral dissertation, Clemson University]. https://open.clemson.edu/all_dissertations/3837
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