Journal of Montessori Research

Contents

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From the Editor

The fall 2023 issue of the *Journal of Montessori Research* is now available. I am so pleased we have a full issue including four research articles and two review articles. One of the review articles, "Rediscovering the Child," represents a new annual feature highlighting recent action research projects completed by graduate students in university-based teacher preparation programs. While authors will rotate for this recurring review article series, I wish to thank Kateri Carver of University of Wisconsin–River Falls and Sarah Hassebroek of St. Catherine University for authoring this first installment.

The other review article provides Susan Feez's (University of New England, Australia) thoughtful assessment of the recently published book *Powerful Literacy in the Montessori Classroom: Aligning Reading Research and Practice* by Susan Zoll, Natasha Feinberg, and Laura Saylor, with a foreword by Daniel Willingham.

The first two research articles in this issue will be of particular interest to Montessori educators because they address important considerations for classroom practice. Andrea Koczela and Kateri Carver share the results of a study of Montessori teachers' circle time practices and preferences while Jaap de Brouwer, Lida T. Klaver, and Symen van der Zee synthesize Montessori's writings on citizenship education.

For the third article, Joel Parham conducted an extensive analysis of primary source documents to reconsider details and implications of Maria Montessori's 1915 California visit. He argues that, while her eight months in California did positively influence the growth of the Montessori movement, the impact on mainstream education was limited and led to declining interest in Montessori education in the United States.

Finally, Bernadette Phillips demonstrates how the Montessori approach to dementia care is trauma-responsive, although she suggests it could be strengthened by incorporating a greater understanding of the neurobiology of trauma into training programs.
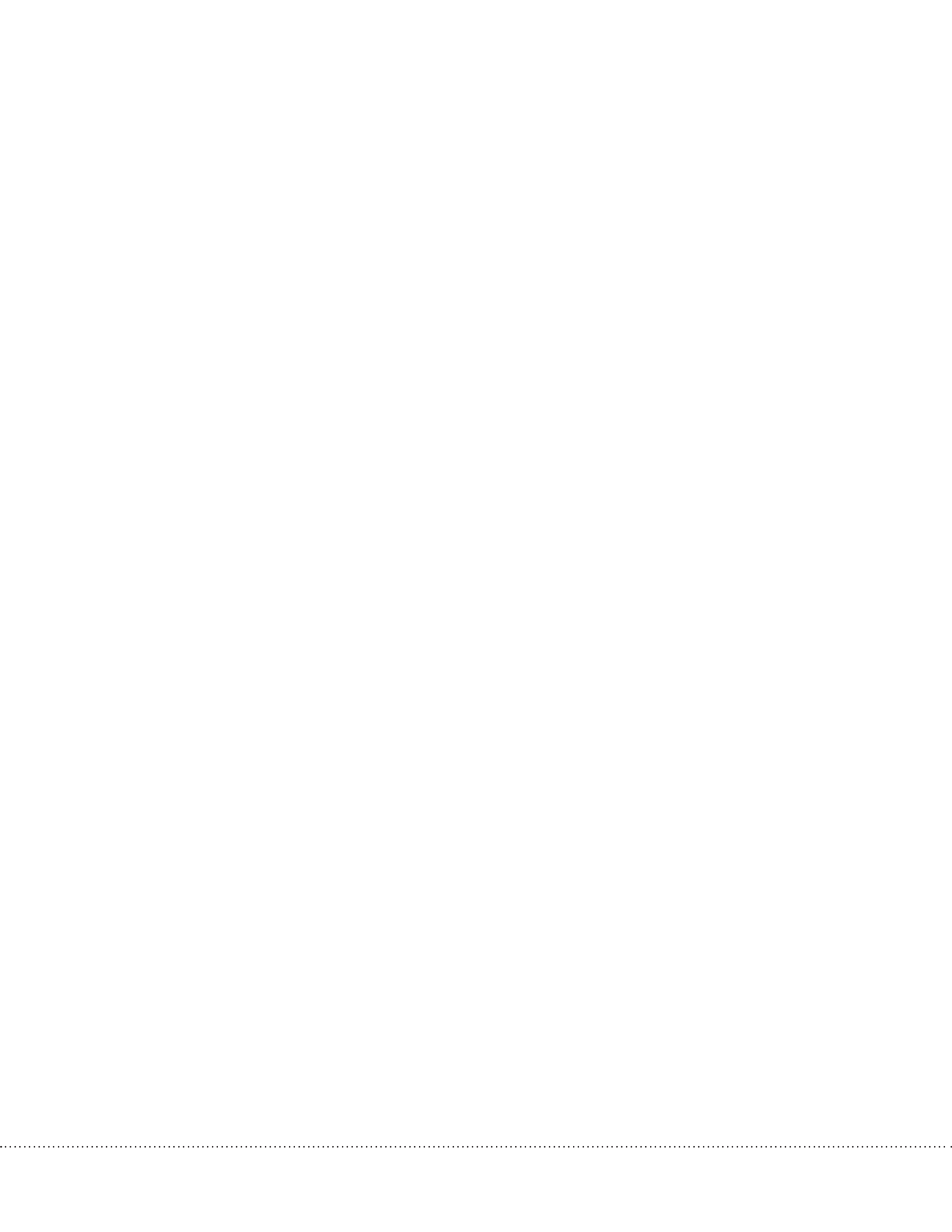

Sincerely,

Angela K. Murray, PhD
Editor, *Journal of Montessori Research*
Director, Center for Learner Agency Research and Action (CLARA)
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Understanding Circle Time Practices in Montessori Early Childhood Settings

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Abstract: Circle time is commonplace in traditional preschools, yet there are few references to the practice in Montessori's writings or in major Montessori organizations' teacher education standards. This article investigates whether circle time is frequent in Montessori 3–6-year-old classrooms using data from a widely distributed Qualtrics survey. The results, from 276 respondents spanning all 50 states, provide insight into the circle time practices of United States-based preschool Montessori teachers, also known in Montessori classrooms as guides. We present novel information regarding circle time duration and frequency, types of circle time activities, Montessori guides' circle time training and planning, whether children's circle time attendance is free choice or compulsory, and the nature of circle time in programs associated with Association Montessori Internationale versus American Montessori Society. Results revealed that 92% of survey participants have circle time every day or most days; most participants hold circle time for 20 minutes or less; the most common circle time events were show-and-tell, calendar work, vocabulary lessons, Grace and Courtesy lessons, read aloud discussions, dancing and movement, snack time, general conversation, read aloud (stories), and birthday celebrations. We found that many of the most frequent circle time activities do not align with children's preferences, teacher preferences, or Early Childhood best practices. Our work invites Montessorians to engage in the work of reconstructing the traditional practice of circle time to better align with Montessori hallmarks of choice, development of the will, and joyfulness.

An Overview of Circle Time

Most preschoolers around the world participate in circle time (Leach & Lewis, 2013). They gather as a group and engage in activities ranging from singing and stories to birthday celebrations and fingerplays. While these meetings are typically identified as circle time, they have other names such as gathering time, community time, or line time. Many Montessorians adopt the phrase line time in reference to the colored tape (line) placed on the floor in an elliptical shape where the children sit during large group gatherings. The children also use this ellipse for Walking on the Line activities, which will be discussed in a subsequent section.

Friedrich Froebel, known as the "father of kindergarten," proposed circle activities in his publication of *Pedagogics of the Kindergarten* (as cited in Platz & Arellano, 2011) to develop children's sense of identity as individuals and members of a community. Circle time theory grew through the humanist ideas of psychologists such as Alfred Adler, Abraham Maslow, Carl Rogers, and William Glasser in the middle of the twentieth century (Housego & Burns, 1994).

In current educational settings, circle time has grown beyond the realms of philosophy into a practice that is identified as "one of the most ordinary events in preschool" (Kantor et al., 1989, p. 434) and widely implemented (Bustamante et al., 2018). Circle practices are documented in countries throughout the world, including the United States, Canada, New Zealand, Israel, Sweden, Finland, Denmark, Germany, Netherlands, Italy, Portugal, England, China, and Japan (Lang, 1998; Zhang & Quinn, 2018).

Yet despite its widespread adoption, minimal research has been conducted on the efficacy and nature of circle time. *The Elementary School Journal* notes this as recently as 2018, stating "little research has examined circle time, making it difficult to generalize about its routines and components" (Bustamante et al., 2018, p. 612). Furthermore, scholarly support for the practice is not overwhelming. A 2002 study published in *Educational Psychology in Practice* reviewed available literature on circle time efficacy and summarized it as "flimsy" and full of "assumption, anecdote and circular argument" (Lown, 2002, p. 95). Other scholars cite the paucity of research about circle time and its effects (Leach & Lewis, 2013). There is no clear consensus on the effectiveness of circle time, no strong understanding of what circle time entails, nor even a consistent definition of its purpose.

Examining Circle Time Literature

In this paper, we will evaluate many aspects of circle time, giving particular attention to the question of duration: how much classroom time should be dedicated to the practice? Research indicates that lengthy circle gatherings result in adverse outcomes. In a study of 122 four- and five-year-old children, the long duration of circle time (sometimes up to 30–40 minutes) was directly associated with negative reactions in children (Wiltz & Klein, 2001). Another study (Bustamante et al., 2018) found that circle time engagement decreased if it lasted more than 20 minutes; at the beginning of circle time, child engagement was generally high, but it declined in all classrooms as time progressed. Half of the classrooms had significant disengagement, with over 30% of students off-task.

Unsurprisingly, the same study noted that in classrooms with lower rates of student engagement, teacher's behavior management comments were twice as high. This finding is supported by other studies documenting high incidences of disruptive behavior during circle time, particularly during more routine, structured activities (Qi & Kaiser, 2006). Researchers from the University of Illinois at Urbana-Champaign conducted 24 observations in eight different Head Start classrooms. They noted challenging behaviors during 30% of their observation intervals and specifically noted that "circle time, as a teacher-directed structured activity, can be a prime context for challenging behaviors" (Zaghlawan & Ostrosky, 2011, p. 8). Such behavior issues can undermine the effectiveness of circle time and overall morale of the teacher and the students (Bustamante et al., 2018). They are also associated with a 22% increase in the rate of negative interactions between teachers and students (Ling & Barnett, 2013).

Clearly it is vital to maximize student engagement, and circle time activities must be planned with care. While the components of circle time vary from school to school and from teacher to teacher (Zhang & Quinn, 2018), researchers agree that the most common elements of preschool circle times include greetings, calendar work, weather discussions, classroom responsibility assignments, attendance keeping, sharing time, read alouds, general conversation, songs/fingerplays, and closing activities (Bustamante et al., 2018; Harris & Fuqua, 2000; Wald et al., 1994).

Of these activities, calendar work is one of circle time's most common events (Zhang & Quinn, 2018). Bustamante et al. observed circle time calendar activities in 77% of the classrooms they studied (p. 621).

While specific teachers may approach calendar work differently, there is reason to reevaluate the suitability of calendar-based activities altogether. Child development research shows that children in preschool and kindergarten settings have little understanding of time periods such as weeks and months (Eliot, 2001). Three-year-olds often have a sense of past and future events but have not yet related these ideas to units of time (Beneke et al., 2008). In a series of four studies conducted on 261 children from 3–10 years of age, researchers found that children were unable to use a calendar to understand the relationship between past and future events until somewhere between ages 7 and 10 (Friedman, 2000). This inability is rooted in children's brain development and their sense of chronology rather than lack of education.

Reading books to children is a quintessential literacy activity and a common circle time event. Yet even this practice must be optimized to meet children's literacy needs by including activities such as dialogical reading, rhyming, and poetry. Researchers have found that children learn best when they engage deeply with the text—apart from pictures—and mentally manipulate the words to develop abstract thought (Healy, 1994). Dialogic reading, in which a child and adult have a prolonged discussion about a book, enhances this intellectual process and develops the child's literacy skills (Eliot, 2001). Research indicates that adults should clearly explain new vocabulary to children as well as initiate discussions about the words (Wasik et al., 2016). Nursery rhymes and poetry may be especially valuable as they provide opportunities for dialogic reading while also teaching rhythm and patterning. Indeed, rhyming aptitude is associated with early reading as well as numeracy skills (Bettmann, 2016; Healy, 1994; Majsterek et al., 2000).

Although listed as a typical circle time activity, few researchers specifically investigated show-and-tell activities. Yet Bustamante et al. (2018) named a similar activity, sharing time, as one of the most "promising" activities in circle time because of the potential for open-ended questions and "back-and-forth exchanges between teachers and children" (p. 626). Arguably, show-and-tell shares the same potential for dynamic language engagement; the benefits of rich language interactions are well documented (Eliot, 2001; Healy, 1994).

The appropriateness of show-and-tell for 3–6-year-olds may hinge on the quality of language interactions during this activity. Since some researchers found that circle-based discussion time was actually the source of "a high incidence of challenging behaviors" (Zaghlawan & Ostrosky, 2011, p. 445), we should ask: Do children engage in rich conversations with their teacher and peers? Or do children simply present an object and answer perfunctory questions? Does show-and-tell provide all children with an opportunity to interact, or does it risk disengagement as one child engages with the guide and the others remain silent? The research on discussion-based activities points to the fact that a child's engagement depends upon a teacher's finesse and execution.

Just as the types of circle time activities vary from classroom to classroom, so too does the quality of these activities. Further research is needed to determine whether the criticisms of circle time are due to widespread practices or to imperfect implementation in a handful of settings. After observing numerous nonoptimal circle times, one study directly advocates improved professional development and teacher training for circle time (Bustamante et al., 2018, p. 628). Other researchers support this notion, finding that positive outcomes in circle time were directly linked to a teacher's circle time experience and training (Canney & Byrne, 2006). Finally, Ling and Barnett (2013) discovered that training teachers in intervention strategies decreased negative behaviors at circle time and increased student engagement (p. 190–191). A teacher's training and circle time preparation may be a critical factor in whether this activity is a source of joy and learning for students or a cause of disengagement and challenging behaviors.

Circle Time and Montessori Practice

Given the consistency of circle time in preschools worldwide, one might expect that it would also be a part of Montessori programs. However, well-regarded authors on Montessori's pedagogy and her legacy are largely silent on the subject. A clear reference to circle time does not seem to exist in Montessori's writings, lectures, or classroom photographs.

In a review of Montessori's writings and lectures, circle time-like gatherings do not appear except in lessons such as Walking on the Line or the Silence Game. Platz and Arellano (2011) analyzed the work of distinguished child development theorists ranging from the 18th to 20th centuries and found that circle-like activities only existed in the ideas of Locke, Rousseau, and Froebel but *not* Montessori. Similarly, researchers Lillard and McHugh (2019) examined Montessori's extensive writings, lectures, and records to define authentic Montessori practice at the time of Montessori's death. In their synopsis, they make no mention of circle time or other large group gath-

Figure 1
Walking on the Line

An early image of Montessori students walking on the line. Reproduced with permission of VS America, Inc. (https://vsamerica.com).

erings except as something inexperienced teachers may adopt if they do not understand the natural work cycle of a child (p. 8).

Montessori presents the activity of Walking on the Line as framed within the Practical Life exercises specifically related to control of movement, which develops coordination, cross lateral movement, and equilibrium (Montessori, 1914, p. 20; 1967, p. 89). She observed the children's desire to walk on narrow ledges and responded by creating Walking on the Line activities (as depicted in Figure 1), which increase in difficulty as a child gains mastery over fine and gross motor skills.

Montessori does make one reference to circle-like activities if a teacher, also known in Montessori classrooms as a guide, is establishing a class with new students. She writes that at the very outset of this process—the "collective stage of the class"—a teacher may tell stories or sing songs with the group (Montessori, 1998, p. 182). However, the conditional nature of this approval implies that these actions are not otherwise ideal. Montessori makes it very clear that these are transitional activities before "the school begins to function" (p. 182).

A classic Montessori lesson, the Silence Game, does have elements akin to circle time. The entire class participates, and it generally occurs at the teacher's invitation.

In some cases that Montessori herself recounts, the whole class comes together for the lesson. In others, "silence" is written on a chalkboard and the children can participate spontaneously. Reviewing Montessori's descriptions of organized versions of the Silence Game gives us insight into how she approached large group lessons; she made several invitations and ensured that each child was asked individually (Montessori, 1998, p. 78). Montessori emphasizes that a child's participation in making silence comes from their own will and is not forced on them by another (Standing, 1998, p. 227). The success of the Silence Game depends upon the active choice of all participants.

The question of choice and voluntary participation, while important in Montessori theory, does not appear in existing circle time research. This gap is understandable as in traditional school settings, children's circle time attendance seems mandatory (Kantor et al., 1989, p. 435). Researchers Zaghlawan and Ostrosky (2011) do not directly address the issue, but list roll call as a common circle time activity (p. 443). Another study made a passing comment that every teacher worked with their whole group during circle time gatherings (Bustamante et al., 2018). These studies indicate that in traditional preschools, a child's participation in circle time is not a matter of choice. Yet as previously discussed, Montessori (1998) herself prioritized personal, authentic invitations for every child in large group gatherings (p. 78).

Leading Montessori organizations do not include circle time in their lists of essential practices. The National Center for Montessori in the Public Sector makes no mention of circle time (or its synonyms) in its "Essential Elements for Montessori in the Public Sector" document, its "Essential Elements Rubric," (2019b) or its "Essential Elements Guidelines" (National Center for Montessori in the Public Sector, 2019a). Similarly, the Montessori Accreditation Council for Teacher Education (MACTE; 2019) does not include circle time in its description of Early Childhood academic requirements or teacher education (p. 22). There is, however, a reference to line activities in the American Montessori Society (AMS) Teacher Education Program (TEP) Handbook. The reference (6.2.5.11) to line activities does not appear under a course component identified as "Core" or "Foundational," but rather under the "Other" category and within the content of "Art, Music, Movement Curriculum" (American Montessori Society, 2018, p. 101). Line activities, which may be broadly interpreted to mean lessons such as Walking on the Line or circle gatherings, have no minimum

required hours and the extent of their inclusion is left to the discretion of the TEP.

Neither the U.S. branch of Association Montessori Internationale (AMI/USA) nor AMS mention circle time or its synonyms on their websites when describing school standards (American Montessori Society, n.d.; Association Montessori Internationale, n.d.). AMI/USA recognition and AMS accreditation requirements seem to suggest that while circle time is not prohibited, neither is it a fundamental part of the method.

The absence of circle time in Montessori writings, TEP standards, school recognition (AMI), and accreditation (AMS) criteria is itself a statement: circle time is, at best, unimportant and, at worst, irrelevant in Montessori preschool (3–6-year-old) classrooms. A clear contrast exists between theoretical Montessori practice, where circle time is hardly featured, and traditional education, where researchers agree that circle time is a fixture of preschool. However, we know anecdotally that circle time occurs in many Montessori preschool classrooms despite its absence in the Montessori canon. How can we understand this disconnect?

Researchers have noted that Nancy McCormick Rambusch founded AMS to integrate traditional Montessori philosophy with the educational culture of the United States (Daoust, 2004, p. 28; Lillard, 2012). Indeed, Lillard observed that the AMS's willingness to adapt may be what has allowed it to thrive while the number of "strict and traditional program(s)" is more limited (Lillard, 2012, p. 381). Although little research examines the differences between AMI and AMS schools, some researchers have noted differences between traditional and contemporary Montessori programs (Daoust, 2004) and high-fidelity and supplemented Montessori programs (Lillard, 2012). The traditional and high-fidelity programs (often more associated with AMI) were less likely to adopt outside educational ideas and practices. The contemporary and supplemented programs (often more associated with AMS) were more likely to incorporate non-Montessori materials and approaches. Considering the ubiquity of circle time in conventional preschools and kindergartens, is it possible that some Montessori schools have sought cultural relevance by incorporating circle time as an educational norm?

To date, circle time research specifically in a Montessori context is lacking. This void prompts the following questions: Are Montessori schools an exception in circle time practices, or do they hold circle time gatherings? If circle time does exist in Montessori classrooms, what are its features and characteristics? Finally, is there a difference in circle time practice between schools associated with AMI and AMS?

Our research documents circle time practices in U.S. Montessori schools with data gathered from Montessori teachers on the following four areas: circle time duration and frequency, types of circle time activities, the Montessori guide's circle time training and planning, and the children's attendance and option to participate. We report on this data generally, and we analyze it across our two largest participant groups: respondents teaching at AMI-associated schools and respondents teaching at AMS-associated schools.

Study Design

This article builds upon an internal review board-approved graduate research project conducted in 2021 and provides stronger analysis and clarity to the initial findings. We distributed a 30-question survey (see Appendix A) to Montessori guides across the United States (Koczela, 2021). The survey instrument utilized the term "circle time" rather than the common Montessori alternative "line time" to be more consistent with existing scholarly literature.

Initially, we sought survey participants through social media invitations. Yet a low response rate—measured by low social media engagement and fewer than a dozen survey responses—necessitated a new circulation strategy. AMI/USA and AMS are the two most widespread accreditation/recognition organizations in our home base, the Upper Midwest, and their public email databases seemed like the logical next step for survey distribution. We emailed our survey invitation (Appendix B) to all listed schools but noticed that certain states were unrepresented or underrepresented in the directories. Hoping to gain nationwide participation, we vetted Montessori schools in these states and sent survey invitations directly to schools that met baseline criteria (a trained Montessori guide, use of a broad range of Montessori materials, mixed age classrooms, and an extended morning work cycle). In total, we sent 806 email invitations. The schools that accepted our invitation distributed the survey among their teachers.

While 324 individuals began the survey, our participant group includes only the 276 who completed the entire question set. Our survey participants represent all 50 states as well as the District of Columbia. Most participants (85%) worked in a private or independent/nonprofit school setting, and the majority were either

lead classroom guides or co-leads (84%). All participants agreed that they were "a current or former Montessori lead, co-lead, intern, or student teacher in a 3–6-year-old classroom" (Appendix A). In addition, we asked a total of seven demographic questions about the participants and their schools. We inquired about participants' years of experience, the number of children in their classroom, the ages of children in their classroom, and the AMI or AMS association of their school. Survey question four asked, "What best describes your Montessori program?" Possible answers were: AMI; AMS; A mix of AMI and AMS; Neither AMI nor AMS; Other; Prefer not to answer (Appendix A). This was the only survey question asking about AMI or AMS association. We asked a variety of demographic questions hoping to find patterns in our survey results. We did not specifically intend to study AMI/AMS associations, and thus did not inquire about a participant's Montessori credential or diploma.

Ninety-five percent of respondents perceive their school as associated with AMI, AMS, or a mixture of the two. This article uses the term *perceived association* to refer to the participants' perception of their school's leaning even though the school may or may not actually hold school recognition with AMI or accreditation with AMS. For example, a participant who reports their school is best described as AMI can mean either (a) their school is a recognized AMI school, or (b) most of the teachers have AMI diplomas. Likewise for participants who report that their school is best described as AMS or a mix of AMS and AMI. The survey did not inquire about the participants' individual Montessori credential, diploma, or teacher education program; instead, it asked about only the association of the school as perceived by the participant.

In looking for patterns in the data, many of the differences between AMI-associated schools and AMS-associated schools were statistically significant and therefore merited attention. We chose to broaden our results section to share and analyze these outcomes while acknowledging that it would have been helpful to seek participants from other TEP affiliations, and additional research with this as a primary question is needed.

Results

We present our data in four sections. First, we explore our results pertaining to time: the frequency and duration of circle time. Second, we share the most common and popular circle time activities. Third, we discuss prepara-tion: ranging from participants' teacher education experiences to their circle time planning approaches. Fourth, we review the question of attendance: who joins circle time and for how long.

In testing for statistical significance, we chose to run Fisher's exact test instead of Pearson's Chi-Square because many cells had expected values less than five and our overall sample size was small. We also report Cramer's V for effect size, although we acknowledge that the results of these effect sizes may be somewhat inflated due to the nature of our data set.

Circle Time Scheduling

The study begins with an investigation of our primary inquiry: How frequently does circle time occur in Montessori Early Childhood programs? Next, we explore the logistics of circle time in greater detail: How long does it typically last?

Figure 2 presents an overview of circle time frequency ("How often does your classroom have circle time?") for all participants and groups the responses by AMI and AMS associations. It is clear from our results that circle time is commonplace in Montessori 3–6-year-old classrooms. Three fourths of participants report having circle time every day in their classrooms and almost all report having circle time either every day or most days. Only a small fraction of respondents never has circle time.

When we review survey responses according to AMI and AMS school associations, it is apparent that the frequency of circle time is somewhat lower in AMI settings, yet it is still very common. More than half of AMI-associated respondents have circle time every day (although higher for AMS-associated respondents), and over three fourths of AMI-associated respondents have circle time every day or most days (versus almost all AMS-associated respondents). Therefore, while circle time is not quite as regular among AMI-associated participants, it still occurs every day or most days for a large majority. Fisher's exact test found that our results are statistically significant, $p <$ .001, Cramer's V = .53, suggesting a large effect (Kotrlik et al., 2011).

In Figure 3, we share all responses related to circle time duration ("On average, how long does circle time generally last?"). This chart illustrates the results for all participants and breaks them out according to AMI and AMS associations. In Figure 4, we correlate responses to participants' years of teaching experience, showing that more experienced guides have shorter circle times.
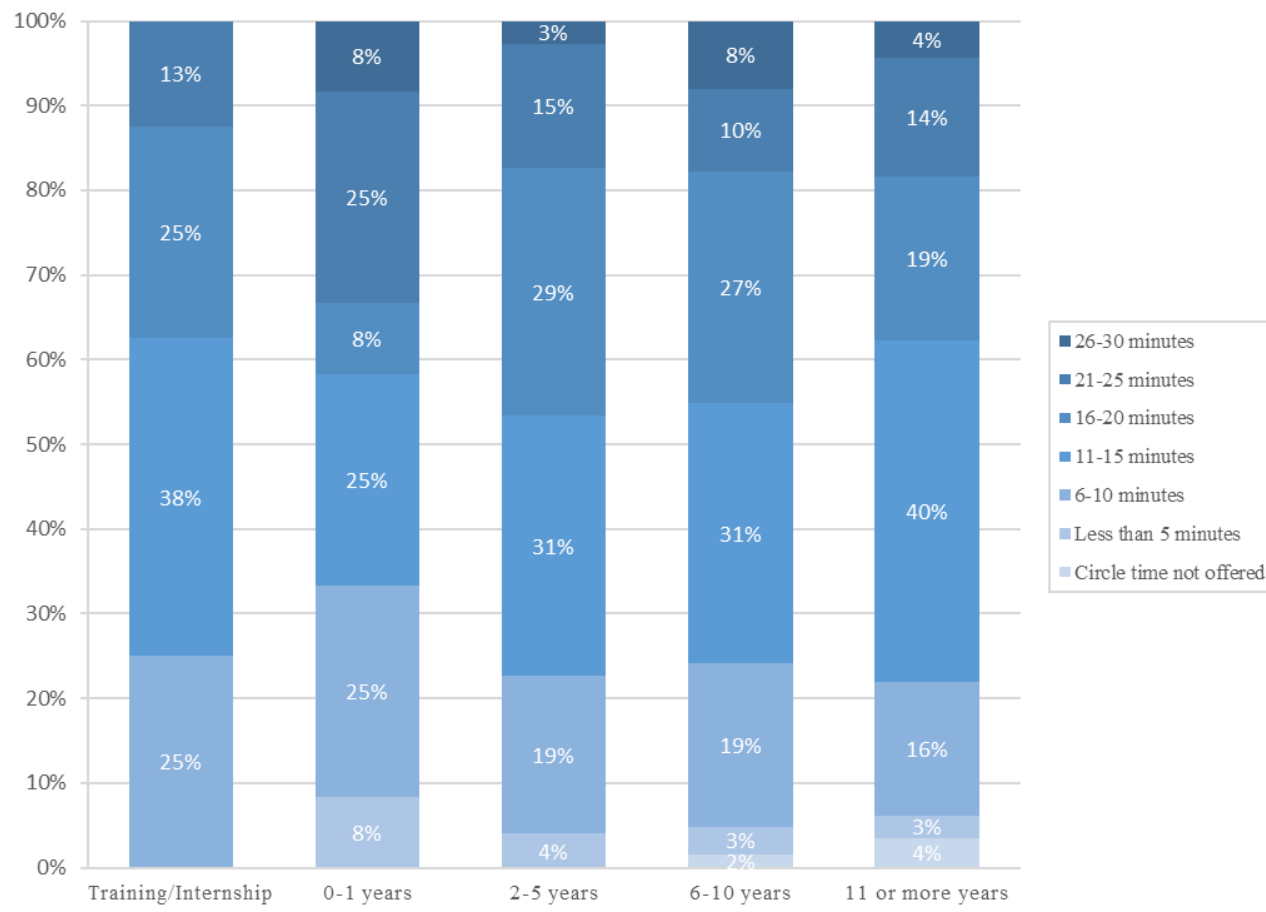
Figure 2
Circle Time Frequency
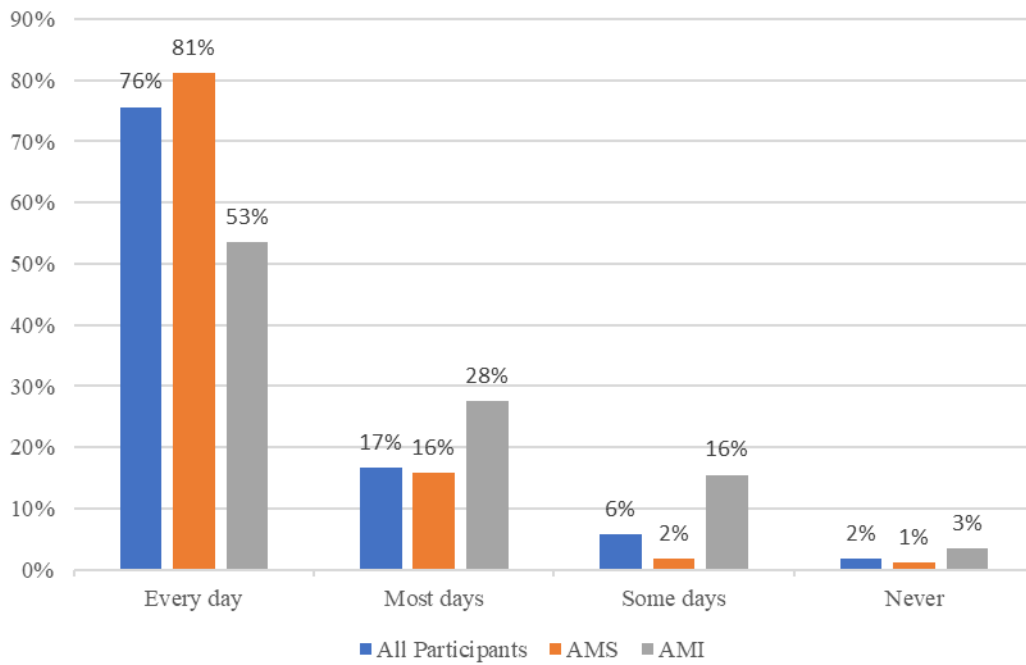
Figure 3
Circle Time Duration
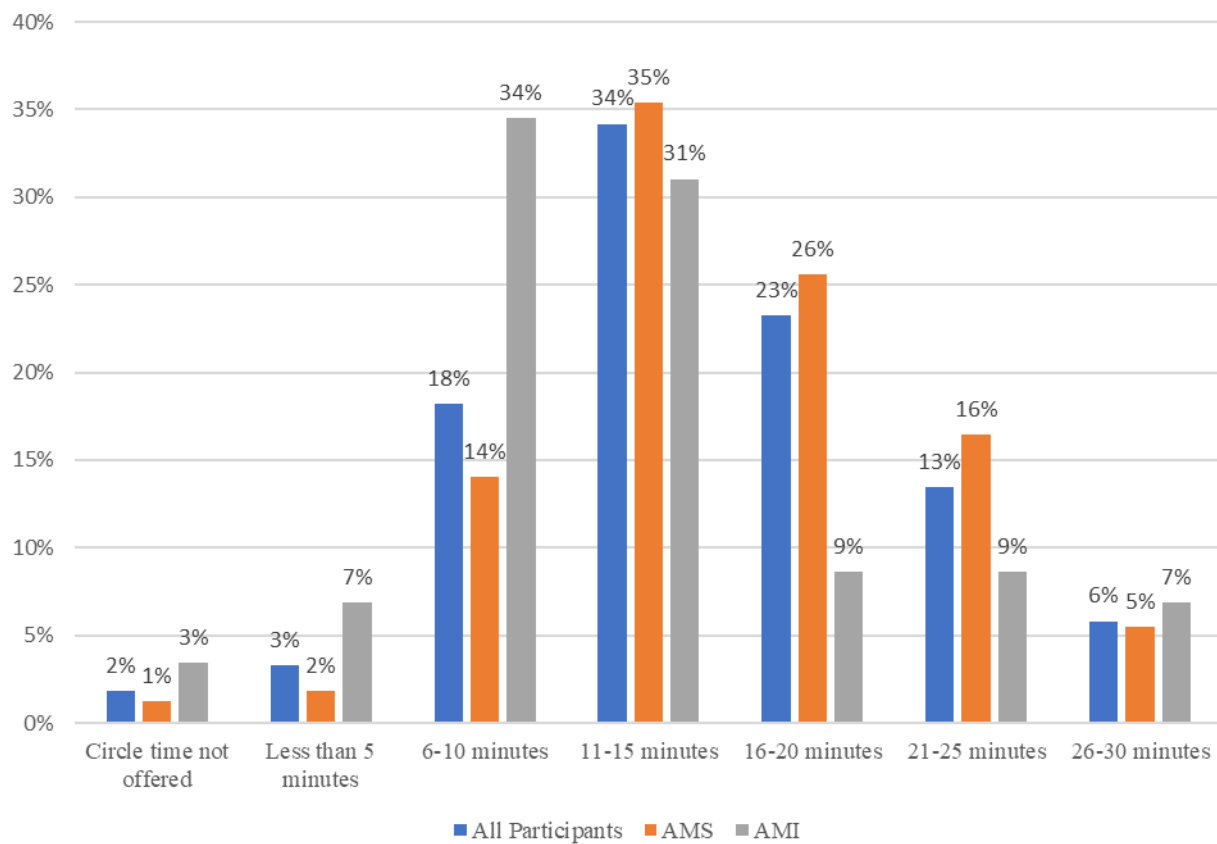
Participants were able to report their typical circle time duration by choosing one of six responses ranging from less than five minutes to up to 30 minutes. Figure 3 illustrates that a large majority of participants held circle time for 20 minutes or less. Only a small number of respondents held circle time for 25 minutes or 26 to 30 minutes. The largest segment of respondents has circle time lasting between 11–15 minutes, corresponding to the recommendations of Bustamante et al. (2018), who advocated decreasing the length of circle time gatherings from their study's average time of 20 minutes. Interestingly, the composition of the 11–15-minute group included the participants with the most teaching experience, suggesting an area for further research regarding teacher experience and circle time practices.

Circle Time Activities

In this section, we detail the frequency of specific circle time activities and then discuss the most popular circle time activities for children and survey participants. Questions 15 through 17 of our survey provided a list of activities and asked participants whether these activities usually, sometimes, or never occurred during circle time. Figure 5 shows our results.

The most frequently occurring circle time activities, according to survey responses, received the same or nearly the same number of results. They are: show-and-tell (196 responses), discussion of day/month/season (calendar work; 196 responses), vocabulary lessons (194 responses), and Grace and Courtesy lessons (194 responses).

According to survey participants' perceptions (see Figure 6), children most enjoy the following circle time activities: singing, read aloud (stories), dancing and movement, music/rhythm work, and birthday celebrations. This list is closely aligned to the participants' most enjoyed activities (see Figure 6): singing, read aloud (stories), general conversation, dancing and movement, and music/rhythm work. These preferences are nearly identical in content and order, apart from birthday celebrations and general conversation. Curiously, they do not match the most frequent circle time activities (see Figure 5).

Figure 5
Frequency of Top Ten Circle Time Activities
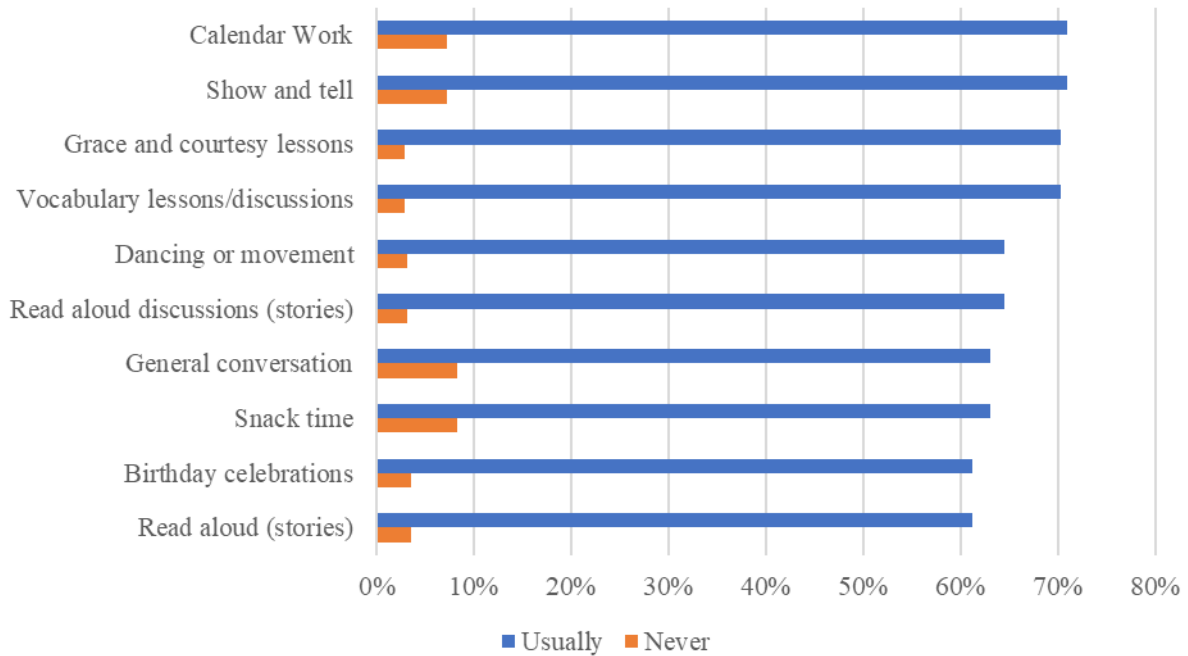
Figure 6
Children's Ten Most Preferred Circle Time Activities with Participant Preferences
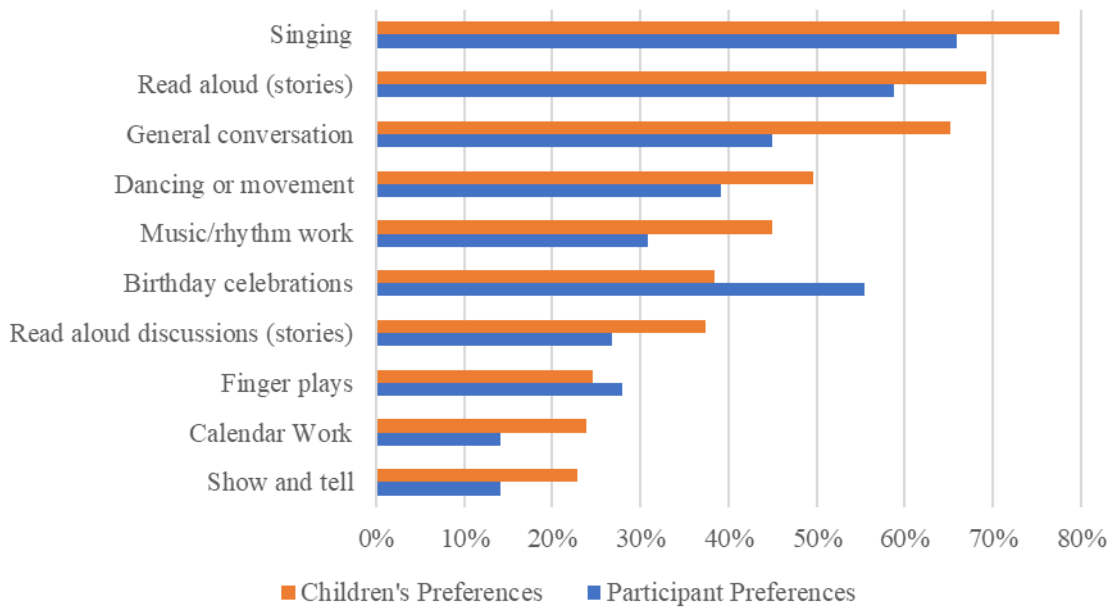
Chart data:

	Always	Usually	Sometimes	Never	Not applicable. We do not have circle time.
All Participants	22%	31%	33%	13%	1%
AMS	25%	35%	31%	10%	0%
AMI	19%	18%	35%	23%	5%

■ All Participants   ■ AMS   ■ AMI

Circle Time Training and Preparation

Our third data section investigates aspects of circle time preparation. First, we explore whether participants feel prepared for circle time by their TEP. Then, we examine how often participants themselves prepare for circle time.
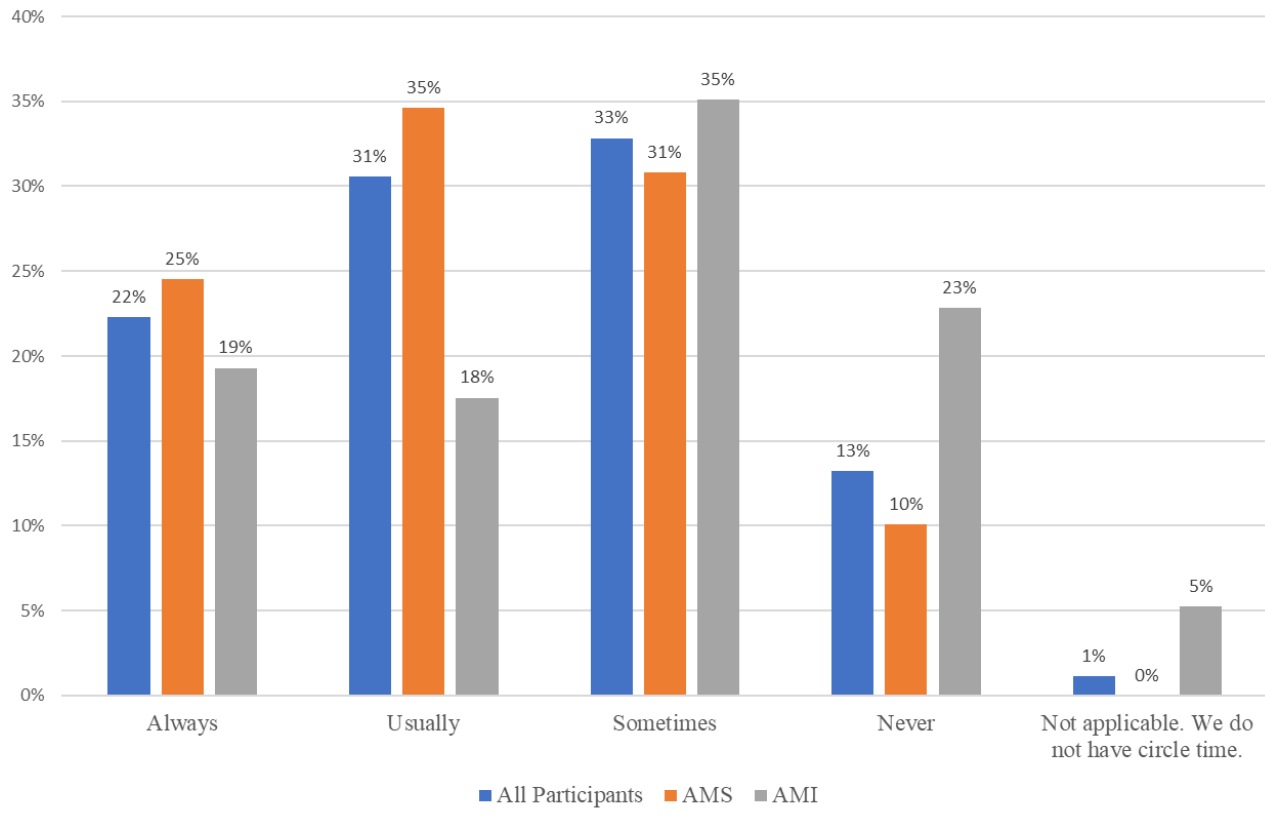
Figure 7 provides an overview of all participant responses to the question, "Do you feel that your training/teacher education program prepared you for circle time?" It also compares participant responses based on their AMI or AMS perceived school association. We are including this comparison because the results demonstrated significant differences. A slight majority of respondents felt that their TEP always or usually prepared them for circle time. A large segment felt that their TEP prepared them sometimes. Only a small group never felt prepared by their TEP. However, these numbers took on new significance when we analyzed responses by the participants' school association. Over half of AMS-associated respondents always or usually felt their TEP had prepared them for circle time versus about a third of AMI-associated respondents. Over twice as many

AMI-associated participants felt their TEP had never prepared them for circle time versus AMS-associated participants. Fisher's exact test found that our results are statistically significant, $p = .01$, Cramer's V = .20, suggesting a small effect (Kotrlik et al., 2011).

Figure 8 illustrates all participant responses to the question "How often do you prepare for circle time?" as well as participant responses by AMI or AMS school association. Again, we emphasize that survey respondents' association refers to their current workplace and not their teacher training.

The largest segment of participants reported that they do not actively prepare for circle time and instead follow their inspiration. A nearly equal number responded that they prepare for circle time daily. Smaller groups of respondents prepare every few days or once a week. According to our data, children almost never lead circle time in these Early Childhood classrooms. Our results become more interesting when we review participants' approaches to circle time preparation according to their perceived AMI or AMS association. Almost twice as many AMS-associated respondents prepare every day versus

Figure 8
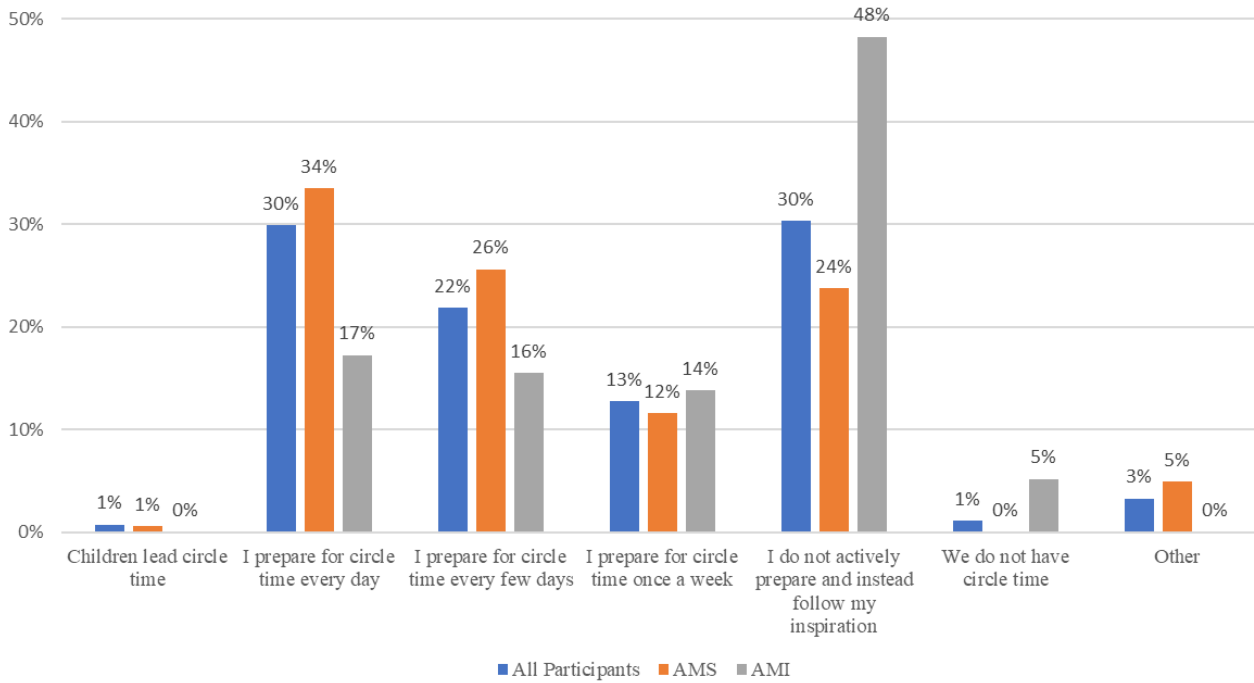Frequency of Circle Time Preparation

AMI-associated respondents. Twice as many AMI-associated participants do not actively prepare for circle time versus AMS-associated participants. Fisher's exact test found that our results are statistically significant, $p < .001$, Cramer's V = .37, suggesting a medium effect (Kotrlik et al., 2011).
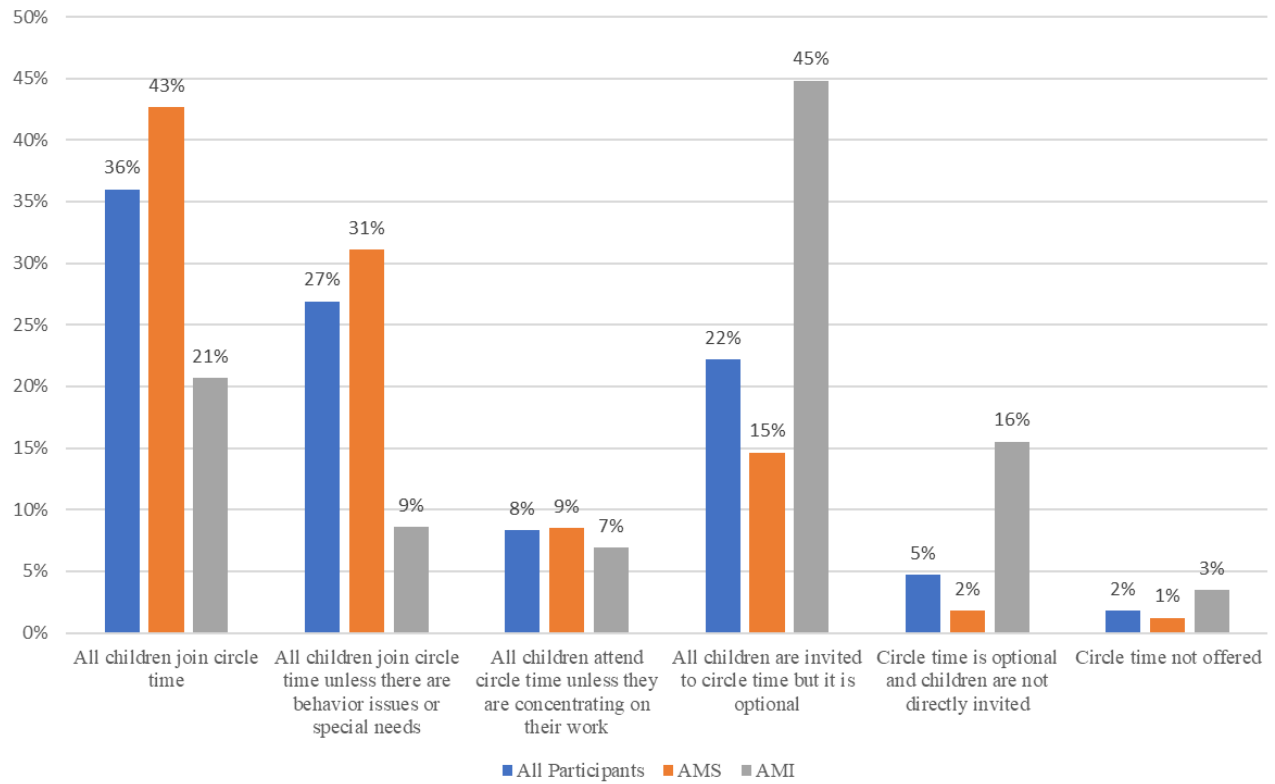
Circle Time Attendance and Choice

Our final results section investigates questions of freedom and obligation as they relate to circle time. We discuss whether children must attend circle time, how long they must stay, whether they are eager to attend, and whether guides are required to have circle time gatherings in their classrooms.

More than half of participants require that children attend circle time except when children have behavior issues or special needs (see Figure 9). Children may choose whether to attend the circle times in about a third of respondents' classrooms. However, we see a large shift in these percentages when we view the data by participants' school association. AMS-associated respondents require that children attend circle time almost three fourths of the time (except when there are behavioral issues); less

than a third of AMI-associated respondents require that children attend circle time (again, except when there are behavioral issues) and instead, most allow children to choose whether to attend. Fisher's exact test found that our results are statistically significant, $p < .001$, Cramer's V = .49, suggesting a medium to large effect (Kotrlik et al., 2011).

Next, we explore whether children must remain at circle time or are free to leave. We see in Figure 10 that all or most participants say children stay for the duration of circle time and only about one quarter of participants say that children may choose to leave circle time before it ends. Yet when we correlate responses based on respondents' perceived school association, we see a substantial difference. Half of AMI-associated participants say children must stay at the circle for its duration (unless there are behavior issues) while over three fourths of AMS-associated participants say children must stay at the circle (unless there are behavior issues). Fisher's exact test found that our results are statistically significant, $p = .008$, Cramer's V = .46, suggesting a medium effect (Kotrlik et al., 2011).

Figure 9
Children's Circle Time Attendance

Figure 10
Duration of Children's Attendance
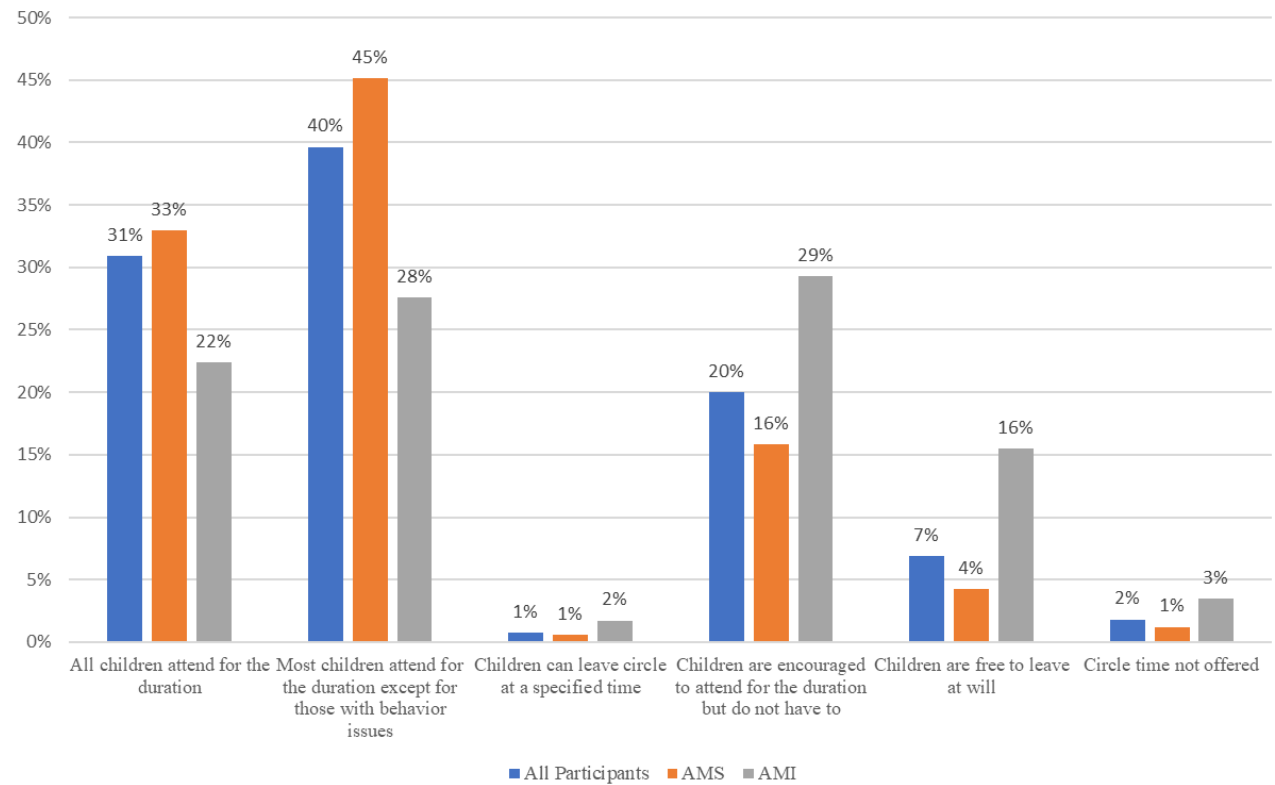
Figure 11
Children's Willingness to Join Circle Time
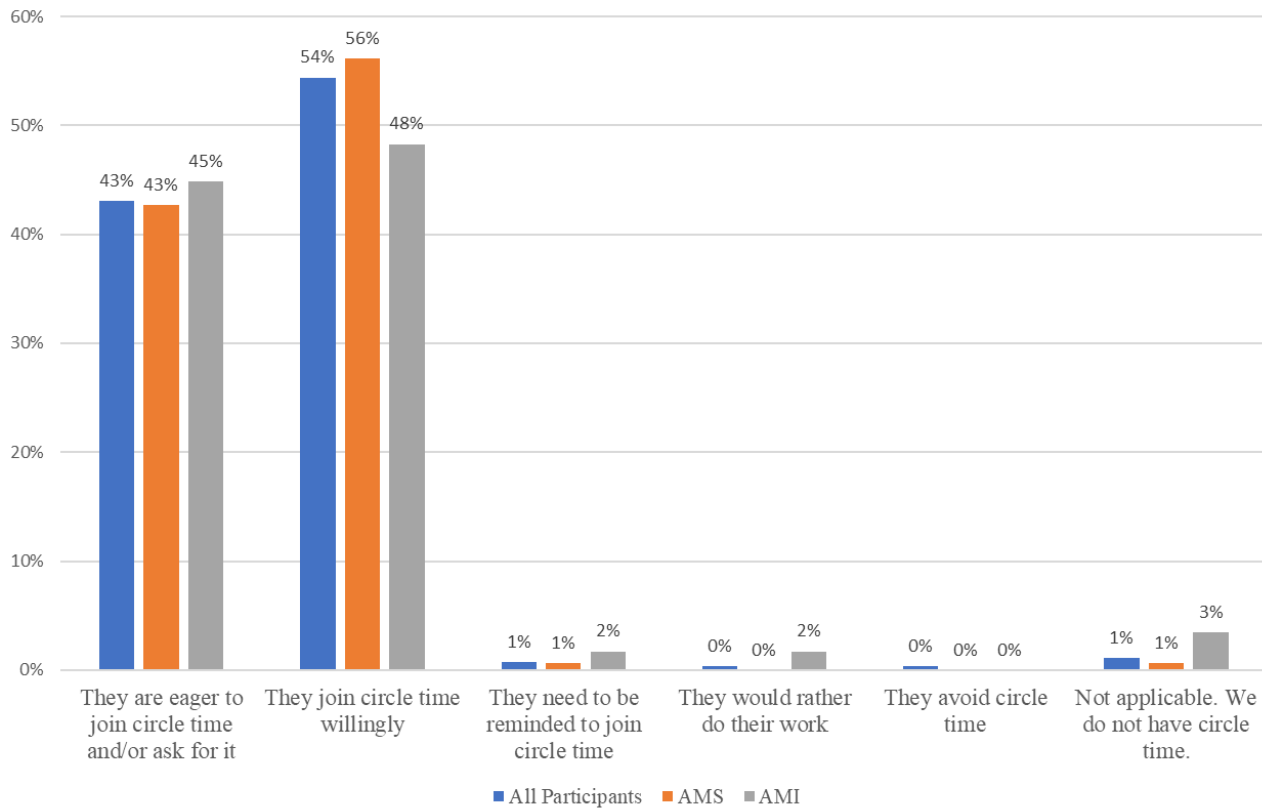
In evaluating questions of freedom and choice, Figure 11 provides an important perspective. Almost all participants across both AMI and AMS school associations report children are eager to attend circle time or at least participate willingly. Only a tiny percentage of participants perceive that children avoid circle time or are reluctant to join.

Finally, we report on whether guides are required to include circle time in the school day. Figure 12 demonstrates that for half of survey participants, circle time is never a school requirement. Yet there does appear to be some level of obligation for others: one third answered that circle time is always or usually required, and a smaller segment responded that it is sometimes required. This picture becomes clearer when we review the matter by AMI/AMS association. A small fraction of AMI-associated participants is always or usually required to offer circle time versus almost half of AMS-associated participants. Over three fourths of AMI-associated participants are never required to offer circle time versus over a third of AMS-associated participants. While the majority of par-

ticipants across all perceived associations are not required to have circle time during the school day, we see that there is a significant element of obligation (perceived or otherwise) for AMS-associated survey participants; over half of AMS-associated respondents answered that they are always, usually, or sometimes required to offer circle time. Fisher's exact test found that our results are statistically significant, $p < .001$, Cramer's V = .22, suggesting a small effect (Kotrlik et al., 2011).

Discussion

The primary goal of our research was to determine the nature and frequency of circle time gatherings in Montessori environments. Our results reveal that circle time is widespread in Montessori classrooms. We identified several other trends in U.S. Montessori practice: most participants hold circle time as the last event of the morning; most participants require that children attend circle time; most children attend circle time for its duration; most participants hold circle time for 20 minutes or less;

Figure 12

Participants' Obligation to Offer Circle Time

Circle Time Scheduling

Research demonstrates the risks of lengthy circle time gatherings and points to resulting student disengagement and challenging classroom behavior with one study suggesting that it may be ideal to limit circle time to 20 minutes or less (Bustamante et al., 2018). Our results indicate that the majority of survey participants align with current best practice, holding circle time for 20 minutes or less regardless of AMI or AMS school association. Even so, circle time duration tends to be

half of participants feel that their TEP prepared them for circle time. Finally, we found differences in AMI- and AMS-associated schools with AMS-associated schools demonstrating more support for circle time activities as a regular part of their day.

shorter among AMI-associated respondents. Interestingly, participants with the most teaching experience (regardless of perceived AMI or AMS association) tend to have shorter circle time durations, which may reflect increased awareness of children's needs in light of higher incidents of behavior issues and student disengagement during long circle times. The role of teacher experience in circle time practices remains a fertile area for further research.

Circle Time Activities

Among our survey participants, calendar work and show-and-tell are the two most common circle time activities, but there is ample evidence that calendar work may be inappropriate until after kindergarten (Beneke et al., 2008; Eliot, 2001; Friedman, 2000). The frequency of calendar activities among our survey participants, de-

spite the evidence contrary to its use, leads us to wonder whether increased TEP circle time instruction would help Montessori guides design and plan their lessons to most benefit children's development.

Although show-and-tell tied as the most frequent circle time activity for our survey participants, there were few specific references to show-and-tell in the work of other researchers. Montessori makes no reference to show-and-tell in her writings and lectures, though she does share at least one account of bringing a sleeping baby to class when she describes the Silence Game. Our survey gives little insight into how participants run show-and-tell during circle time and whether the activity leads to high quality language interactions with the entire group. We know that discussion-based activities have potential for value or risk depending on implementation (Bustamante et al., 2018; Zaghlawan & Ostrosky, 2011). Further research is needed to determine whether show-and-tell is a valuable part of the school day and a justification of circle time.

Although our results suggest that calendar work and show-and-tell were the most common circle time activities, our results also show that they were *not* perceived by the guide as the children's favorites. In fact, our survey responses indicate that the circle time activities which inspire the most interest in children (according to participants' perceptions) are often not the most frequent events of circle time. Only one of the children's preferred five activities (dance and movement) mapped to the five most frequent circle time events. Two favorites of the children, singing and music/rhythm work, were not among the 10 most frequent activities. It is curious that survey participants note this interest yet choose to include other activities more often during circle time. Notably, four of the five most popular circle time practices for children match four of the five most popular for guides. Yet again, these same activities are largely absent in the reported activity frequency. The data also reveal that not only do the guides avoid the children's favorites, but they choose activities that they would prefer to avoid themselves. We must ask: Is there such strong pressure from schools, parents, or educational norms that guides disregard children's favorite activities, and their own, in order to accommodate ones viewed to be necessary, such as show-and-tell or the ubiquitous calendar work?

The Silence Game is also absent among the most common circle time activities. While it still occurs for most participants, 10 other activities are more frequent. It is surprising that the Silence Game, the one lesson that

Montessori describes as requiring whole-group participation, is not prioritized. Given participants' misalignment with children's preferences, their own preferences, and Montessori's writings on whole-group gatherings, we wonder how they *do* select circle time activities. Do survey participants choose activities as the result of a conscious choice, TEP training, or conflicting expectations of what circle time entails?

Circle Time Training and Preparation

Considering that the various Montessori organizations barely reference circle time in their criteria, it is noteworthy that many respondents reported circle time training in their TEP. Still, our data indicate that the arena of teacher education has significant potential for growth or reevaluation. Many participants indicate that they could have been better prepared by their TEP for circle time gatherings.

We do not know in what ways survey participants could have been more prepared for circle time, but we do know that many reported a lack of teacher education on this topic. For the Montessori guides who received no circle time training, yet offer it in their classrooms, we wonder when and why they began to practice circle time. Was it a result of children's needs, school norms, or parent pressure? For other guides who felt sometimes prepared, we wonder what additional training would have been beneficial: perhaps more circle time presentations, more education about current research, more practice time, more opportunity to observe circle times, or more literacy and music/movement training? Follow-up research is needed to provide a clearer picture.

Still, considering how much time is spent each week during circle time in most Early Childhood Montessori classrooms (often an average of 75–100 minutes per week), it seems appropriate for TEPs to give circle time training serious consideration. Even Montessori recognized that there were moments in a classroom, though unusual, when it is appropriate to sing songs or read stories as a group (Montessori, 1998). It seems reasonable to equip guides of 3–6-year-old children with the skills they need to conduct engaging and educational read alouds or developmentally appropriate music and movement sessions. Further, Montessori guides must be able to give parents and administrators rationales for excluding unnecessary or detrimental large group activities.

It is likely that there is a connection between participants' TEP and their approaches to circle time preparation. The fact that a significant portion of teachers do not actively plan for this part of the day may reflect inade-

quate teacher education. While there is evidence that poorly run circle time gatherings contribute to behavioral problems or student disengagement, teacher training and experience have been shown to lead to positive outcomes. The decision to include circle time during the school day should be an active choice by guides who are trained and prepared to make the most of these gatherings. Current research suggests that circle time should be treated with as much planning and care as other classroom instruction. In a Montessori setting, this would place circle time planning on par with observation, lesson planning, preparation of the environment, and record keeping.

Circle Time Attendance and Choice

Freedom and choice are essential elements of Montessori practice, but our data reveal that in most participants' classrooms, circle time attendance is required. AMS-associated respondents are more likely to require children to attend circle time compared to AMI-associated participants who are more likely to make circle time optional for children. A similar pattern exists in how long children are required to remain at circle time. AMS-associated participants are more likely to require children to remain at the circle for most of the time (barring behavioral difficulties) compared to AMI-associated participants. Thus, AMS-associated participants are more likely to treat circle time as a large group gathering in which all or most children join for the duration, while AMI-associated participants are more likely to treat circle time as an optional gathering that children can join at will, akin to Montessori's invitations to the large group versions of the Silence Game. It is important to note that children seem to join circle gatherings willingly or even eagerly, suggesting that most children would choose to attend circle time even when it is optional. Children's strong interest in circle time may reflect an inner need that is not otherwise being met. These questions arise: Do Montessori guides, through careful observation, recognize circle time as essential to children's development? Is the method of direct invitation and free choice—as in Montessori herself inviting children to the Silence Game—ineffective in some settings? How can we offer circle time while still supporting a child's development of free will?

The question of freedom also applies to Montessori guides. Few participants were required to offer circle time except for about half of those at perceived AMS-associated schools (our largest participant group). Perhaps some teachers may not be formally required to have circle time but still face pressure to include it during the day—

perhaps from peers, parents, administration, or societal expectations. The question remains: Is circle time, so universal in preschools around the world, a practice freely chosen in Montessori classrooms?

Study Limitations

Despite the important contribution this study makes in understanding circle time practices in Montessori schools, we acknowledge limitations. In our attempt to broaden the scope of our research and include more participants, we directly searched for Montessori schools in geographical areas that were not represented or were underrepresented in the AMI and AMS databases. Our process was necessarily subjective as we reviewed school websites to ascertain adherence to core Montessori principles (e.g., a trained Montessori guide, use of a broad range of Montessori materials, mixed age classrooms, and an extended morning work cycle). We trusted that the school websites were accurate and updated while also using our judgement to determine if school images were authentic or stock photos.

The social media participants also raise potential issues because they represent a convenience sample of teachers self-identified as a current or former Montessori lead, co-lead, intern, or student teacher in a 3–6-year-old classroom. Furthermore, it would have strengthened our research to reach out to other TEP affiliations. In retrospect, we could have reduced ambiguity by providing a more specific definition of what we meant by the role of "former Montessori lead."

Finally, our survey focuses disproportionately on private and independent schools (85% of participants) with only 11% of participants representing public or charter schools. A recently published Montessori census article reports a total of 2,728 Montessori schools in the United States with 579, or 21%, being publicly funded (Debs et al., 2022). While we invited public and charter Montessori schools to participate in the survey, many refused. We discovered during the course of our research that some public school districts require all research surveys, regardless of IRB approval, to go through their internal review process before employees can participate.

Furthering the Study

The scarcity of circle time research, particularly within a Montessori context, necessitates increased scholarly research. Moreover, the universality of circle time in all

preschool settings underscores the importance of defining circle time best practices. While there are many promising areas for future research, we consider four areas deserving of particular attention. First, how does circle time impact the Montessori morning work cycle? We know anecdotally that some Montessori programs struggle to achieve an uninterrupted three-hour period of work. If, as we now know, many Montessori preschools include circle time, does this gathering affect the amount of time available for children to complete their morning work cycle?

Second, it would be helpful to examine the community meeting practices of Montessori elementary programs in relation to their preschool counterparts. What continuity, if any, exists between community meetings at different grade levels and how can guides prepare 5- and 6-year-olds to be active participants and future leaders of elementary large group gatherings?

Third, what is the role of Montessori guides in circle time gatherings? How does teacher experience affect Montessori circle time practices? Do guides observe sufficiently during circle time to adjust their practices according to the needs of the children? Are children able to voice their preferences and develop their wills? Why, as we discovered in our results, do guides include circle time activities that are not preferred by the children or themselves?

Fourth, to what extent do circle time gatherings contribute to the classroom community and interpersonal skills of children? In an increasingly remote, screen-centric world, what role does circle time play in fostering a sense of belonging in young children and how can it teach them vital interpersonal skills such as patience, active listening, grace and courtesy, and respect?

Conclusion

This study provides many insights. We know, based on nearly 300 responses, that circle time is commonplace in Montessori classrooms. We also know that the nature of circle time differs between AMI- and AMS-associated settings; it is more often optional in the former versus obligatory in the latter. We know that a substantial number of participants felt that their training did not always or usually prepare them for circle time. Finally, we know that some circle time activities do not align with research-based best practices or perceived child interest.

Let us return to our initial questions regarding the effectiveness, purpose, and intentionality of circle time

in Montessori 3–6-year-old classrooms. There are clear risks to casual circle time practices that may be mitigated through careful TEP preparation and intentional classroom planning. Montessorians have every reason to heed circle time research in traditional education that documents disengagement and concomitant misbehavior resulting from lengthy gathering times, developmentally inappropriate activities such as calendar work, and obligatory attendance. Let us listen to the 45% of respondents who felt underprepared to lead circle time. Strengthened TEP circle time content may help Montessori guides comprehend both the risks and potential of circle time gatherings and understand how to utilize this time effectively, if at all.

Finally, how can we reevaluate circle time in light of Montessori's constant refrain of "follow the child?" Have Montessorians absorbed the practice of circle time with sufficient reflection on its form and content while also considering Montessori philosophy and the needs of the child? We believe that circle time *can* adhere to the Montessori tenets of choice and the development of the will and, at the same time, provide rich opportunities for joyful expression and instruction. Yet constructing circle time gatherings that epitomize the best Montessori and Early Childhood practices requires intentional thought, constant observation, and ongoing education. We hope to join a larger conversation about how Montessorians might reimagine circle time so that it supports, empowers, and delights its child participants.

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Appendix A: Survey Instrument

Q1 Informed Consent

Q2 Thank you for your participation! For the purpose of this survey, "circle time" means a collective, large group gathering during **morning**, **in-person** class time; it is synonymous with the phrases "line time" and "gathering time." Please answer questions according to your pre-COVID practices.

Please only participate in this survey if you are a current or former Montessori lead, co-lead, intern, or student teacher in a 3–6-year-old classroom.

First, we would like to ask a few questions about you and your classroom.

1. What is your primary role in the classroom?
- o   Montessori lead
- o   Montessori co-lead
- o   Montessori assistant
- o   Montessori student teacher
- o   Retired/former Montessori lead
- o   Other
- o   Prefer not to answer

Q3 What best describes your school?
- o   Private
- o   Public
- o   Independent/Nonprofit
- o   Charter
- o   Magnet
- o   Parochial
- o   Other
- o   Prefer not to answer

Q4 What best describes your Montessori program?
- o   AMI
- o   AMS
- o   A mix of AMI and AMS
- o   Neither AMI nor AMS
- o   Other
- o   Prefer not to answer

Q5 Where is your school located? [state list displayed]

Q6 About how many students are in your classroom?
- o   10 or less
- o   11 to 15
- o   16 to 20
- o   21 to 25
- o   26 to 30
- o   31 or more
- o   Prefer not to answer

Q7 How long have you been a Montessori guide?
- o   I am in training/doing an internship
- o   1 year or less
- o   2–5 years
- o   6–10 years
- o   11 years or more
- o   Prefer not to answer

Q8 What ages are the children in your classroom? Please choose all that apply.
- o   Less than 2 years old
- o   2 years old
- o   3 years old
- o   4 years old
- o   5 years old
- o   6 years old
- o   7 years old
- o   Prefer not to answer

Q9 We will now ask some questions about the timing and logistics of circle time in your classroom.
How often does your classroom have circle time?
- o   Every day
- o   Most days
- o   Some days
- o   Never
- o   Prefer not to answer

Q10 When does circle time **usually** occur during the day?
- o   First thing in the morning
- o   During the morning
- o   End of the morning
- o   No fixed time
- o   Prefer not to answer

Q11 On average, how long does circle time generally last?
- o   Less than 5 minutes
- o   6–10 minutes
- o   11–15 minutes
- o   16–20 minutes
- o   21–25 minutes
- o   26–30 minutes
- o   31 minutes or longer
- o   Prefer not to answer

Q12 Who attends circle time?
- o   All children join circle time
- o   All children join circle time unless there are behavior issues or special needs
- o   All children attend circle time unless they are concentrating on their work
- o   All children are invited to circle time but it is optional
- o   Circle time is optional and children are not directly invited
- o   Circle time is initiated by the children and is optional
- o   Prefer not to answer

Q13 How long do children attend circle time?
- o   All children attend for the duration
- o   Most children attend for the duration except for those with behavior issues
- o   Children are encouraged to attend for the duration but do not have to
- o   Children can leave circle at a specified time
- o   Children are free to leave at will
- o   Prefer not to answer

Q14 Usually during circle time...
- o The guide talks most of the time
- o The guide and children (collectively) share/participate an equal amount of time
- o Children share/participate most of the time
- o Prefer not to answer

Q15 The following three questions have the same possible answers. We will ask about the frequency of various circle activities: whether they occur usually, sometimes, or never.

Which of the following activities **usually** occur during circle times? Please choose all that apply.
- o General conversation
- o Adult led question and answer
- o Discussion of day/month/season ("calendar work")
- o Discussion of weather
- o Music/rhythm work
- o Singing
- o Read aloud (stories)
- o Read aloud discussions (stories)
- o Read aloud (poetry)
- o Read aloud discussion (poetry)
- o Vocabulary lessons/discussions
- o Dancing or movement
- o Finger plays
- o Grace and courtesy lessons
- o Peace/conflict resolution lessons or discussions
- o Math games or lessons
- o Literacy games or lessons
- o Cultural games or lessons
- o Other group presentations
- o Birthday celebrations
- o Guest presentations
- o Silence game
- o Snack time
- o Seasonal celebrations
- o Presentations of new materials
- o Discussion of class rules
- o Show-and-tell
- o Other
- o None of the above. We do not have circle time.
- o Prefer not to answer

Q16 Which of the following activities **sometimes** occur during circle time? Please choose all that apply.
- o General conversation
- o Adult led question and answer
- o Discussion of day/month/season ("calendar work")
- o Discussion of weather
- o Music/rhythm work
- o Singing
- o Read aloud (stories)
- o Read aloud discussions (stories)
- o Read aloud (poetry)
- o Read aloud discussion (poetry)
- o Vocabulary lessons/discussions

o   Dancing or movement
o   Finger plays
o   Grace and courtesy lessons
o   Peace/conflict resolution lessons or discussions
o   Math games or lessons
o   Literacy games or lessons
o   Cultural games or lessons
o   Other group presentations
o   Birthday celebrations
o   Guest presentations
o   Silence game
o   Snack time
o   Seasonal celebrations
o   Presentations of new materials
o   Discussion of class rules
o   Show-and-tell
o   Other
o   Prefer not to answer

Q17 Which of the following activities **never** occur during circle time? Please choose all that apply.
o   General conversation
o   Adult led question and answer
o   Discussion of day/month/season ("calendar work")
o   Discussion of weather
o   Music/rhythm work
o   Singing
o   Read aloud (stories)
o   Read aloud discussions (stories)
o   Read aloud (poetry)
o   Read aloud discussion (poetry)
o   Vocabulary lessons/discussions
o   Dancing or movement
o   Finger plays
o   Grace and courtesy lessons
o   Peace/conflict resolution lessons or discussions
o   Math games or lessons
o   Literacy games or lessons
o   Cultural games or lessons
o   Other group presentations
o   Birthday celebrations
o   Guest presentations
o   Silence game
o   Snack time
o   Seasonal celebrations
o   Presentations of new materials
o   Discussion of class rules
o   Show-and-tell
o   Other
o   Prefer not to answer

Q18 Now we would like to know about reactions to circle time in your class.
How do **most** of the children in your class respond to a circle time invitation?

- o   They are eager to join circle time and/or ask for it
- o   They join circle time willingly
- o   They need to be reminded to join circle time
- o   They would rather do their work
- o   They avoid circle time
- o   Not applicable. We do not have circle time.
- o   Prefer not to answer

Q19 How many children participate during circle time (verbally or with motions)?

- o   All children participate during circle time
- o   Most children participate during circle time
- o   Some children participate during circle time
- o   Children usually don't participate during circle time
- o   Prefer not to answer

Q20 What do children seem to enjoy most during circle time?

- o   General conversation
- o   Adult led question and answer
- o   Discussion of day/month/season ("calendar work")
- o   Discussion of weather
- o   Music/rhythm work
- o   Singing
- o   Read aloud (stories)
- o   Read aloud discussions (stories)
- o   Read aloud (poetry)
- o   Read aloud discussion (poetry)
- o   Vocabulary lessons/discussions
- o   Dancing or movement
- o   Finger plays
- o   Grace and courtesy lessons
- o   Peace/conflict resolution lessons or discussions
- o   Math games or lessons
- o   Literacy games or lessons
- o   Cultural games or lessons
- o   Other group presentations
- o   Birthday celebrations
- o   Guest presentations
- o   Silence game
- o   Snack time
- o   Seasonal celebrations
- o   Presentations of new materials
- o   Discussion of class rules
- o   Show-and-tell
- o   Other
- o   Prefer not to answer

Q21 Do you enjoy circle time?

- o   Always
- o   Usually
- o   Sometimes
- o   Never
- o   Prefer not to answer

Q22 What do you usually enjoy most during circle time? Choose all that apply.

- o   General conversation
- o   Adult led question and answer
- o   Discussion of day/month/season ("calendar work")
- o   Discussion of weather
- o   Music/rhythm work
- o   Singing
- o   Read aloud (stories)
- o   Read aloud discussions (stories)
- o   Read aloud (poetry)
- o   Read aloud discussion (poetry)
- o   Vocabulary lessons/discussions
- o   Dancing or movement
- o   Finger plays
- o   Grace and courtesy lessons
- o   Peace/conflict resolution lessons or discussions
- o   Math games or lessons
- o   Literacy games or lessons
- o   Cultural games or lessons
- o   Other group presentations
- o   Birthday celebrations
- o   Guest presentations
- o   Silence game
- o   Snack time
- o   Seasonal celebrations
- o   Presentations of new materials
- o   Discussion of class rules
- o   Show-and-tell
- o   Other
- o   Prefer not to answer

Q23 Now we would like to learn about your circle time planning and preparation.

Do you feel like your training/Teacher Education Program prepared you for circle time?

- o   Always
- o   Usually
- o   Sometimes
- o   Never
- o   Not applicable. We do not have circle time.
- o   Prefer not to answer

Q24 How often do you prepare for circle time?

- o   I prepare for circle time every day
- o   I prepare for circle time every few days
- o   I prepare for circle time once a week
- o   I do not actively prepare and instead follow my inspiration
- o   Children lead circle time
- o   Other
- o   Prefer not to answer

Q25 How do you prepare for circle time? Please choose all that apply.

- o   By reviewing my classroom observations
- o   By reflecting on the students' needs or interests
- o   By having discussions with my co-lead/assistant

- o By referring to lesson plans and records
- o By checking the calendar for events or birthdays
- o By reflecting on housekeeping needs
- o By discussions with students
- o By following inspiration
- o I do not actively prepare
- o Prefer not to answer

Q26 In your circle time preparation, how much time do you plan for student participation during circle time?
- o I plan for students to participate constantly during circle time
- o I plan for students to participate most of the time
- o I plan for students to participate about half of the time
- o I plan for students to participate occasionally
- o I plan for the students to participate rarely
- o I do not plan for student participation
- o Prefer not to answer

Q27 In our final section, we would like to explore how circle time impacts the three-hour work cycle in your classroom, knowing that many teachers face obstacles in this regard.
How long is the typical morning work cycle in your classroom (from when children begin their work to when they stop working in the morning)?
- o 2 hours or less
- o More than 2 hours–2.5 hours
- o More than 2.5 hours–3 hours
- o More than 3 hours–3.5 hours
- o More than 3.5 hours
- o Prefer not to answer

Q28 Do you feel like circle time complements the morning work cycle?
- o Always
- o Usually
- o Sometimes
- o Never
- o Prefer not to answer

Q29 Do you feel like circle time lessens the morning work cycle?
- o Always
- o Usually
- o Sometimes
- o Never
- o Prefer not to answer

Q30 Are you required to offer circle time in your classroom?
- o Always
- o Usually
- o Sometimes
- o Never
- o Prefer not to answer

Appendix B: Survey Invitation

Hi there,

I am reaching out in hopes that you and your teachers will consider assisting me in my graduate research work. I am a master's student at UWRF and I'm studying Montessori circle time practices (or lack thereof) for my thesis project. I am distributing a survey to AMI and AMS schools across the United States to learn more about Montessori circle time norms and the three-hour work cycle. The survey is completely anonymous and is hosted on the UWRF Qualtrics website. Would your primary level teachers consider taking the survey? There are 30 questions and it should take 10–12 minutes to complete. Please feel free to email/call/text with questions. I am happy to provide more information. The survey may be found here:

Insert Link

Thank you in advance for your time,

Andrea Koczela

4xx-xxx-xxxx

Montessori's Perspective on Citizenship Education: A View from the Netherlands

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Abstract: The purpose of this study is to synthesize Montessori's writings on citizenship education to support the implementation of a Montessorian view. This synthesis demonstrates that Montessori was of the explicit conviction that a better world can be achieved through citizenship education, as it strives for a peaceful and harmonious society. We approach this topic through the Dutch context. Although schools in the Netherlands are required by law to promote active citizenship and social cohesion, this law does not stipulate which of the many different views on citizenship education schools must adhere to. Schools have the liberty to devise their own citizenship curricula if they can substantiate their views and choices. For Montessori schools, this requires insight into Montessori's view on citizenship education. Although Montessori's views are still largely appropriate in our time, an ongoing dialogue about citizenship education is required, as Montessori lived and worked in a specific geopolitical context. Based on our analysis, we have identified seven themes that characterize Montessori's view on citizenship education: one common citizenship goal; preparation for independent thinking and action; image of the future citizen; adapted and critical citizens; humanity for harmony; knowledge as prerequisite, personality development as goal; and an ever-expanding worldview. The results of this study provide valuable insights for designing and teaching citizenship education through a Montessorian lens.

Citizenship education is a hot topic in the Netherlands (e.g., De Groot et al., 2022). While the recently passed Dutch Citizenship Education Act provides some direction, schools are largely left to explicate their views on citizenship education and implement practices accordingly. Dutch Montessori schools naturally want to base their practice on Montessori's ideas, but Montessori schools' and teachers' views on citizenship education may differ from her original vision. This is especially likely to be the case in the Netherlands where the Montessori Method has been understood, developed, and implemented liberally from its inception in 1914 (de Brouwer et al., 2023). Since the twentieth century, schools have added elements to Montessori education and have put an emphasis on certain aspects in response to developments in education and in society. Despite the flexible ways in which Montessori principles are being implemented, all schools affiliated with the Dutch Montessori Association adhere to the Montessori philosophy.

The aim of this study is to synthesize Montessori's writings on citizenship education to support the implementation of a Montessorian view, which will support Dutch Montessori schools in fulfilling their legal obligation and pedagogical ambitions regarding the implementation of citizenship education. Although there has been some writing on Montessori's work in light of citizenship education, these works are mostly essays, published in non-peer reviewed journals (e.g., Hacker, 2015; Leonard, 2015). Only four of her works have been systematically reviewed with a focus on citizenship education through a literature-based, qualitative content analysis related to global citizenship and sustainability in Lower and Upper Elementary and in middle school. In this review, Gynther and Ahlquist (2022) focused on how to promote citizenship competencies and sustainability within Montessori education rather than on Montessori's original intent. Deeper insight into Montessori's views can help inform educational practices as schools formulate a Montessorian view on citizenship education.

In what follows, we briefly describe the importance and history of citizenship education with a specific focus on the Netherlands. Our argument that views on citizenship education diverge quite substantially supports the motivation for and context of our study. Summarizing these differing views allows us to consider Montessori's perspective within the range of possible ideas about citizenship education. We then provide a brief description of Montessori's life, with special attention to the geohistorical context of her time in relation to her ideas about citizenship education.

Citizenship Education

Convictions on the objectives of citizenship education have widely differed since ancient times. For example, while the education system in Sparta trained males to become loyal citizens through discipline and military skills, the Greek and Roman elites, along with military training, were taught math, reading, art, philosophy, and music as well (Heater, 2002). In the late 18th and 19th centuries, mass schooling became the favored strategy of European states for nation building and citizenship development (Ramirez & Boli, 1987). What citizenship education precisely entailed depended on the different states' ideologies (Heater, 2002). Democratic citizenship education developed as a result of Enlightenment ideals, while totalitarian states, such as Nazi Germany, used education to indoctrinate the young into the regime's ideology. Democratic citizenship education meant that education promoted, for instance, knowledge about in-stitutions, civic morality, and patriotism. When and how citizenship education developed in democratic countries depends on varying factors such as immigration, religion and secularism, voting rights, military conflict, multiculturalism, globalization, and the formation of supranational institutions such as the European Union.

Citizenship Education in the Netherlands

Dutch citizenship education was influenced by a wide array of political and pedagogical thinkers such as Johan Rudolph Thorbecke, Philip Kohnstamm, Martinus Langeveld, and, more recently, Micha De Winter, as well as by the prevailing political climate and disrupting events such as the attacks of September 11, 2001, and the murder of the Dutch politician Pim Fortuyn (De Jong, 2021; Doppen, 2010). Different religious opinions and different ideas about the role of religion in education led to the so-called School Struggle (*schoolstrijd*), which was finally settled with Article 23, often referred to as Freedom of Education (Rietveld-van Wingerden et al., 2003). Through this article, the constitution stipulates that the government decides on core educational objectives and supervises educational quality, but schools themselves are free to choose their educational methods and adapt the curriculum how they see fit. Because of Freedom of Education, the Netherlands now has great diversity in publicly funded schools with regards to religious orientation (e.g., Protestant, Catholic, and Islamic) and has publicly funded schools with a range of pedagogical orientations (e.g., Montessori, Dalton).

All schools can develop their own methods for and outlook on citizenship education as long as they adhere to the core educational objectives determined by the Dutch government. Citizenship education became obligatory in all types of secondary education in 1968, when social studies (*maatschappijleer*) became part of the curriculum (De Jong, 2021). This subject was meant to provide an introduction to modern society, but its objectives and who should teach it were left unclear and became a subject of debate. More recently, since the 1990s, social cohesion, individualization, multiculturalization, and national identity have become major themes in the discussion about the importance of citizenship education. To promote active citizenship and social integration, a law on citizenship education (*burgerschapsonderwijs*) was passed in 2006 (De Groot et al., 2022). Moreover, to support the development of a shared national identity, the Dutch historical canon became a required part of primary and secondary school curriculum in 2009 (Doppen, 2010).

Citizenship competences of Dutch students, measured in the International Civic and Citizenship Education Study of 2016, lagged behind those of students in comparable countries (Dijkstra et al., 2021). In addition, societal concerns grew about extremism, polarization, and the weakening of the democratic constitutional state (Eidhof, 2018). The debate about citizenship education was fueled by incidents that showed friction between the state's conception of good citizenship and Article 23's Freedom of Education stipulations (De Groot et al., 2022).

To clarify the schools' citizenship task and to better equip the Inspectorate of Education to intervene, the Dutch Citizenship Education Act was passed in 2021 (De Groot et al., 2022). In line with the 2006 Citizenship Education Act, it obliges schools to promote active citizenship and social cohesion. The amended act of 2021 further required that citizenship education must focus on respect for and knowledge of the basic values of the democratic state, on the development of social and societal competencies, and on knowledge and respect for differences and equal treatment of all citizens. In addition, the 2021 act mandated that schools must ensure a culture in line with basic democratic values so that students can practice these values in an environment where students and staff feel safe and accepted. Although the new law provides some direction for education, schools themselves must formulate citizenship objectives, determine their educational methods, and assess their students' development (Inspectorate of Education, 2022) beginning with formulating their views on citizenship education.

Contemporary Views on Citizenship Education

There appears to be no consensus on the precise meaning of citizenship education. One way of thinking about citizenship education—attributable to Dewey (van der Ploeg, 2019)—is to view the whole of education as civic education (Van der Ploeg & Guérin, 2016). From this viewpoint, the school is responsible for general education. Developing elementary competences such as critical thinking and judgment skills, along with offering a wide and in-depth curriculum, all add up to the requirements of good citizenship. However, a more particular conception of citizenship seems to underpin mainstream citizenship education policy and research (Guérin, 2018; Guérin et al., 2013; Joris, 2022). Guérin coined the term *participatory approach* for this conception of citizenship education. This approach is based on an idea of good citizenship characterized by political literacy, critical thinking skills, certain values, attitudes, behaviors (such as freedom, equality, respect, tolerance, and solidarity), and active participation. Hence, citizenship education can entail, for example, children being encouraged to visit lonely elderly people, to pick up litter from the streets, to vote, to volunteer, and to respect and be tolerant of differences. According to Van der Ploeg (2020), this participatory approach to citizenship education is consistent with the prevailing culture of neoliberalism, which assumes that everyone must take care of themselves and stand up for themselves, and that societal problems can be solved by improving individuals' behavior and lifestyle.

Although mainstream research and policy are based on the participatory idea and thus suggest consensus on the associated goals (Eidhof et al., 2016), other researchers argue that there is in fact no consensus about the objectives of citizenship education and that differing views on democracy and good citizenship exist (e.g., Guérin, 2018; Sant, 2019). Ideas about democracy and good citizenship can emphasize community, togetherness, and a focus on behaving productively and appropriately (i.e., communitarian perspective). However, the emphasis can also be on autonomy, individual rights, and liberty (i.e., liberal perspective). Yet another, more critical approach to citizenship emphasizes social justice, where a good citizen views society critically and acts accordingly (i.e., critical-emancipatory perspective). While these three approaches to good citizenship seem distinct, intermediate forms and slight variations are, of course, possible (e.g., Eidhof et al., 2016; Geboers et al., 2015; Guérin, 2018; Leenders & Veugelers, 2009; Sant, 2019; Westheimer & Kahne, 2004). In addition to these three approaches, other ideas about citizenship are less known. For example, there are more agonistic perspectives, in which conflict is seen as valuable (Parra et al., 2021; Sant, 2019; Van der Ploeg & Guérin, 2016; Van Waveren, 2020). Additionally, non-participatory perspectives exist, which do not consider it necessary at all for everyone to be politically involved in order for a democracy to function (Van der Ploeg & Guérin, 2016).

Because of the range of views on democracy and good citizenship, schools must clearly justify why they choose a certain perspective (Guérin, 2018). To clarify what citizenship education can mean, we have contrasted the different views on citizenship education by posing the following fundamental questions:

1. What is the "why" of citizenship education?
2. Who is responsible for citizenship education?

3. What is the ideal citizen?
4. Should citizenship education prescribe specific values and behaviors?
5. What is emphasized in citizenship education?
6. What is the context of citizenship education?

The appendix presents examples of possible contradictions for each fundamental question on citizenship education. These contradictions provide the framework for our analysis of Montessori's writings. Although we contrasted views, intermediate views are often possible. For developing the framework of views on citizenship education, we referred to literature about views on good citizenship and citizenship education (e.g., Guérin, 2018; Jeliazkova, 2015; Van der Ploeg, 2020; Veugelers, 2011), the goals of citizenship education (e.g., Eidhof, 2020; Hodson, 2020; Van der Ploeg & Guérin, 2016), citizenship and democracy (Biesta, 2021), and about the contexts for citizenship education (Biesta et al., 2009). The complete framework of views on citizenship education, as used for our analysis, can be found in the appendix.

A Closer Look at Montessori's Life to Provide a Deeper Context for Her Views

In this study we synthesize Montessori's writings that deal with citizenship education to express her view on citizenship and citizenship education. Events in Montessori's life and the period in which she grew up shaped the way in which she interpreted the concept of citizenship in her pedagogy. Montessori advocated for human rights and the emancipation of women well before her career as an educator (Moretti, 2021). Montessori was a delegate to the International Congress of Women in Berlin in 1896 where she not only represented Italy but also spoke on equal rights to work and equal wages for men and women. After graduating from medical school in 1896, Montessori worked as a volunteer at the psychiatric clinic in Rome where she encountered children with intellectual disability. During this period, she realized that working with these children was more of a pedagogical issue rather than a medical one, and she became convinced of the need for special schools (Kramer, 1976). Over time, Montessori began to explore educational and pedagogical approaches to serve these children.

In the early 1900s, entirely new neighborhoods were built around Rome to improve the lives of future citizens. These plans addressed the root causes of deprivation and inequality by educating young children through societal awareness and emancipation (Moretti, 2021). In 1907, Montessori applied what she had learned in her work with intellectually disabled children in Rome's low-income neighborhoods where she established the first Casa dei Bambini, which would later prove to be the starting point of the worldwide dissemination of the Montessori Method (Kramer, 1976).

Montessori Education in Italy

As Montessori schools started to flourish in other countries in the early 1920s, Montessori was introduced to Mussolini, the then prime minister of Italy, in 1923. Mussolini announced that he wanted to transform Italian schools according to the Montessori Method—a policy decision Montessori was eager to embrace, given the small number of Montessori schools in Italy at the time (de Stefano, 2020; Kramer, 1976). A national Montessori training program, under state patronage, was established in 1926, but the transformation of Italian schools into Montessori schools proved difficult. According to Kramer (1976), Montessori insisted that she was "apolitical and that 'the cause of the child' superseded ephemeral distinctions of party and nation" (p. 281). While this basic incompatibility meant that cooperation with Mussolini's fascist regime was convoluted from the very start, her relationship with Mussolini remained cordial, and Montessori even made some concessions to adapt her method to the fascist ideology—although it remains unclear what adjustments, if any, were implemented (de Stefano, 2020; Leenders, 1999). However, as government interference in the Italian Montessori Society and the organization of Montessori teacher training kept increasing, a rupture became inevitable (Moretti, 2021; Quarfood, 2023). After ten years of collaboration with the regime, Montessori dramatically withdrew in 1933, leading to the closure of all Montessori schools in Italy in 1936 (de Stefano, 2020; Quarfood, 2023).

Emerging Perspective on Peace

Gradually, starting around 1932, Montessori increasingly spoke of peace education and of one world for all humanity, a precursor to her ideas of world citizenship. Montessori started to place an increased emphasis on children's rights. She no longer focused solely on changing the adult in the school, but also on changing society and therefore the world through education (de Stefano, 2020). To strengthen this view, Montessori announced the Social Party of the Child at the International Montessori Congress in Copenhagen in 1937, which was a party that championed the rights of the child and ex-

amined contemporary sociopolitical problems from the child's perspective (Montessori, 2019a; Moretti, 2021). During World War II, when Montessori was in India for a prolonged period, she further developed the concept of cosmic education, which essentially embodies the responsibility for building peace and developing moral values (Raimondo, 2023). After spending the World War II years in India, Montessori returned to Europe in 1946. In 1951, a year before her death, she spoke at UNESCO about the importance of early childhood education to improve society and the world.

When examining the concept of citizenship in Montessori education, we cannot avoid considering the historical context of Montessori's life. Her statements about citizenship are deeply rooted in and informed by the geopolitical times through which she lived. Keeping this in mind, we revisited Montessori's original works with a team of Dutch Montessori experts to analyze her conception of citizenship more closely. The main question of this study is: What did Montessori think about citizenship education?

Method

This paper provides a comprehensive analysis of Montessori's view on citizenship based on a literature review conducted by a panel of Dutch Montessori experts.

Expert Panel

The panel of five Montessori experts conducting the review was selected by the Dutch Montessori Association. The panelists were Jaap de Brouwer, Anastasia Dingarten, Esther Pelgrom, Mirjam Stefels, and Annemarie Looijenga. Each panelist has more than fifteen years of experience as a Montessori teacher, teacher educator, administrator, and/or researcher. De Brouwer, leader of the expert panel, is a Montessori researcher and Montessori teacher educator with classroom experience as a Montessori teacher. Dingarten has a background in philosophy and is also a Montessori teacher educator. Both Pelgrom and Stefels have backgrounds as Montessori teachers and are now experienced Montessori teacher educators. Looijenga was also a Montessori teacher and now holds a doctorate in educational research, having conducted her research in Montessori schools.

Procedure

Using the framework of views on citizenship education (see the appendix), the panel started discussing these views within Montessori philosophy in three two-hour

sessions. For example, the panelists discussed whether Montessori's view on citizenship education is focused on cohesion within the child's community or on cohesion within society as a whole, and if Montessori's view on citizenship education is mainly focused on attitudes and behaviors or mainly on knowledge. Discussing these different views on citizenship education provided an initial shared idea of Montessori's stance on citizenship education within the expert panel. As citizenship education or related contemporary terminology was not part of Montessori's vocabulary, the panelists formulated sensitizing concepts, which they identified as closely related to Montessori's view on citizenship education based on the aforementioned discussions. Sensitizing concepts give ideas of directions to pursue and sensitize researchers to particular aspects of a topic (Boeije, 2010). These concepts were: cosmic education, moral development, citizenship, peace, society, social development, responsibility, freedom, and independence. These concepts were used to identify relevant Montessori literature. Using Montessori's own terminology not only guided the panel to select relevant books but also relevant quotations within these books. For example, the term cosmic education led us to include Montessori's book *To Educate the Human Potential* in the literature review while excluding *Psychoarithmetic* because it mentions none of the identified concepts. The literature search of Montessori's works began with six books selected based on consensus within the panel regarding their relevance (see Table 1). Each book was read fully and reviewed by one of the panelists, and the retrieved citations were discussed in the panel. Based on these discussions, panelists identified and read another eight books (see Table 1), resulting in a saturation of new relevant citations .

The panel reviewed 14 of Montessori's books in total (see Table 1). As the example in Table 2 demonstrates, each panelist subdivided and systematically ordered their retrieved citations by the views on citizenship education as outlined in the framework in the appendix. This resulted in 494 citations of Montessori's view on citizenship education found in her books, subdivided and systematically ordered using the same framework (see the appendix). Some citations fit in multiple views of citizenship education. Table 2 demonstrates only a subset of Montessori's citations that fit this view of citizenship education as an example of the analysis we employed. De Brouwer wrote a synthesis from the combined categorized Montessori literature citations. The synthesis was completed with the help of two rounds of discussion with the panel. Panel members reviewed and provided written feedback

Table 1

General Description of the Methodology

Phase 1	The panel discussed views on citizenship education resulting in an initial shared idea of Montessori's views on citizenship education.
Phase 2	The panel formulated sensitizing concepts to identify relevant Montessori literature: cosmic education, moral development, citizenship, peace, society, social development, responsibility, freedom, and independence.
Phase 3	First round of reading and reviewing by the panel members. All retrieved citations were discussed in the panel. Citizen of the World (2019) Education and Peace (1949/1992) Door het Kind Naar een Nieuwe Wereld [Through the child into a new world] (1941/1952) The Formation of Man (1949/1954) The Child, Society and the World (1979/2016) To Educate the Human Potential (1947/1998)
Phase 4	Second round of reading and reviewing by the panel members based on previous expert-panel discussion. All retrieved citations were discussed in the panel. The Advanced Montessori Method (1917/2022) Education for a New World (1946) From Childhood to Adolescence (1973) Creative Development in the Child (2020) The Montessori Method (1909/2016) The 1946 London Lectures (2012) The Secret of Childhood (2021) The Absorbent Mind (1949/2019)
Phase 5	The panel members systematically ordered their retrieved citations, using the framework of views on citizenship education.
Phase 6	De Brouwer wrote a synthesis from the categorized citations, completed with two rounds of discussion within the panel and one round of written feedback by the panel members.

Table 2

Example of Systematically Ordered Retrieved Citations, Using the Framework of Views on Citizenship Education

View on citizenship education	Society (government, school, parents) may decide what kind of citizen children should be. / Children themselves may decide what kind of citizen they want to be.
Montessori citations	"One of the tasks of the child is to build himself adapted to the environment. (…) Adaptation is the starting point, the ground we stand on" (Montessori, 2019a, p. 11). "The adult defeats the child; and once the child reaches adulthood the characteristic signs of the peace that is only an aftermath of war—destruction on one hand and painful adjustment on the other—remain with him for the rest of his life. The age-old, superficial notion that the development of the individual is uniform and progressive remains unchanged and the mistaken idea that the adult must mold the child in the pattern that society wishes still holds sway. (…) The child is not simply a miniature adult. He is first and foremost the possessor of a life of his own that has certain special characteristics and that has its own goal" (Montessori, 1949/1992, p. 15). "The only true freedom for an individual is to have the opportunity to act independently" (Montessori, 1949/1992, p. 55).

on the final synthesis, but the member check did not lead to content-related revisions.

Results

From her experiences and perspective, weighing the consequences of the geopolitical context of Europe in the first decades of the 20th century, Montessori was convinced that the improvement of society should begin with educational reform. Montessori (1941/1952) reasoned that if the children do well, the world will eventually do well. She spoke of the "new man," a generation of children capable of building a new form of community, a new society in which strong, independent personalities live together peacefully and freely (Montessori, 1941/1952; 1949/1992, p. 21). Montessori education is therefore primarily aimed at fostering the progress of society. Montessori was confident that children could achieve this goal if they were properly prepared for it. Children, according to Montessori (1941/1952, 1949/1992), should not be raised in the image of the adult. Instead, education should enable children to shape their own futures because "the child plays a fundamental role in determining the future of humanity" (Montessori, 1941/1952, p. 35). This future requires an education that enables children to develop into independent, balanced people that can make contributions to society (Montessori, 1941/1952).

Based on our analysis, we have identified seven themes that characterize Montessori's view on citizenship education: (1) one common citizenship goal; (2) preparation for independent thinking and action; (3) image of the future citizen; (4) adapted and critical citizens; (5) humanity for harmony; (6) knowledge as prerequisite, personality development as goal; and (7) an ever-expanding worldview. Each of these themes are discussed in the sections that follow.

One Common Citizenship Goal

Citizenship, or the pursuit of a better society, is a responsibility for all adults (Montessori, 2019a). Montessori (2019a) stated that human beings do not form a society if they only pursue their own personal goals. The ultimate form of human society is based on organization, cohesion, and having common objectives. The common goals that Montessori talked about include allowing the child's personality to mature, which can then contribute to the advancement of a civilized, cohesive, and peaceful human society (Montessori, 1949/1992, 1946). Home and school should work together to achieve this common goal (Montessori, 1941/1952).

According to Montessori (1947/1998, 1979/2016), many changes for the benefit of the child were required to achieve this common citizenship objective, including parenting techniques, teaching methods, and the school system itself. While early in the 20th century the general conditions for adults improved, Montessori (1949/1992) noted that conditions for children had worsened. The key to improving conditions for the child was in the hands of the adults who should be less proud, less selfish, and less authoritarian (Montessori, 1979/2016). Montessori revolted against the old patterns in which teachers imposed their own values and beliefs onto the children (1947/1998). She argued that teachers had to give the children space to form their own opinions and judgments (1947/1998).

Montessori believed the same philosophy held true for the traditional educational system at large because it was not developing the child's personality (Montessori, 1979/2016). The environment did not allow children to be active and, therefore, they were not allowed any influence. Moreover, while the school curriculum should be an aid to education, it should not be imposed on humanity in the name of an ideology or out of a social or political belief (Montessori 1941/1952, 1949/1992, 1979/2016). Montessori (1946, 1949/1992) indicated that education should no longer consist of imparting knowledge but should instead follow a new path, a path that explicitly strives to unfold human potential and the development of personality. Urging a changing role for parents, teachers, education, and adults in general is typical of Montessori's thinking about citizenship. Upbringing and education shapes new generations, empowers them, and thereby enables them to do things differently, if they decide to do so themselves.

Preparation for Independent Thinking and Action

Montessori (1949/1992) believed that children should decide for themselves about the kind of citizens they want to be but not necessarily figure it out all by themselves. Montessori (1947/1998) believed that children should be empowered so that they can make their own informed decisions. To make informed decisions, children should be initiated into society, study it, and try to understand and accommodate it (Montessori, 1941/1952, 1979/2016, 2019a). Teachers can give children the freedom to experience and absorb complex society in their individual ways by teaching them the norms, practices, behavior patterns, ideals, religions, and

other aspects of their society (Montessori, 1941/1952, 1979/2016). Practices and experiences thus form the basis for social and moral education in Montessori education (Montessori, 1941/1952). In Montessori's (1947/1998) view, education bears a specific responsibility to provide these experiences, although it is a shared responsibility of the school with parents or caregivers and community organizations. According to Montessori (1973, 1979/2016), home, school, and other organizations must work together as the child cannot develop without a social environment.

Image of the Future Citizen

Montessori (1949/1992) had a clear image of an ideal society in which citizens are interconnected and responsible for living together in harmony. Being part of a community entails rules of behavior and obligations that make it possible to live together in a peaceful manner (Montessori, 2019a). The ideal citizen seeks common goals, contributes to these goals, is an independent and balanced personality, and behaves responsibly to make a harmonious society possible. Although Montessori gave children the freedom and responsibility to decide for themselves what kind of citizens they want to become, she did have a clear conception of the future society—how education could contribute to it, and what kind of citizen was needed for that society. This represents a paradox in Montessori's thoughts about citizenship: while the adult should not impose moral judgments on children and children should be given the liberty to decide for themselves what kind of citizen they wanted to become, Montessori did have clear images of what the future society might look like and what kind of citizens would be required.

Adapted and Critical Citizens

The ideal citizen as seen by Montessori is both socially adaptable and critical. Montessori (1941/1952, 1949/1992, 1949/2019b) emphasized the importance of social cohesion not based on personal desires but on social integration, where individuals identified with the group to which they belonged (Montessori, 1949/2019b). The human harmony of which Montessori wrote requires adaptability of the individual. According to Montessori (2019a), becoming a well-adapted citizen is a crucial starting point for children's development into independent, balanced human beings who can fulfill their adult roles in future society. Kindness toward others, love, peace, brotherhood, respecting other people, offering

help when needed, and dignity—these objectives cannot be reached by merely teaching them, but rather by having children experience and practice them from an early age, over a long period of time (Montessori, 1941/1952).

A child that has adapted to culture and society can subsequently begin to have independent thoughts about the individual's role in relation to society, hence becoming a critical citizen. Montessori called for independent thinking and giving children freedom to express themselves and shape the world for themselves (Montessori, 1941/1952, 1947/1998). She believed those who want to work for a better society should not be guided by political ideals or religion but rather be in the service of the whole of humanity itself (Montessori, 1949/1954, 1947/1998). Montessori's ideal citizen therefore deeply understands society, its values, and virtues, and uses this knowledge to think and act in freedom and with a sense of responsibility toward society as a whole and the unique individuals within it.

Humanity for Harmony

Montessori (1941/1952, 1949/1992, 1979/2016, 1949/2019b) advocated solidarity, harmony, and peace, but noted that society does not adequately prepare people for a life as citizens. There is, according to Montessori (1949/1992), no "moral organization" of the masses (p. xi). People are raised to see themselves as isolated individuals who must satisfy their immediate needs by competing with other individuals. Montessori (1979/2016) argued that humanity is unaware of the need for unification. She saw people fighting for themselves, their families, and their nation, yet being unaware of their responsibility of working together (Montessori, 1947/1998). Montessori saw it as her task to make children aware of the need for unity because the mission of education is to cultivate peace and peacefulness in children (Montessori, 1946, 1947/1998, 1949/1992). It would take a powerful educational effort, according to Montessori (1949/1992), to enable people to understand and structure social phenomena, to propose and pursue collective goals over individual ones, and thus to achieve ordered social progress.

Knowledge as Prerequisite, Personality Development as Goal

In her call for a civilized, peaceful, and harmonious society, Montessori seems to have been more focused on the social aspect of citizenship education than the political. She was politically active on a personal level with, for example, her commitment to women's rights

and the promotion of children's rights, but she did not envision a role for politics in education. As a result, it remains unclear how and to what extent politics should be part of the curriculum. Montessori (1949/1992) did express her opinion that politics should prevent conflicts and schools could contribute to this political mission by cultivating peace and peaceful problem solving. While laws can protect the rights of children to support them growing up to be responsible, peaceful citizens, Montessori (1979/2016, 2019a) argued that laws by themselves will never suffice to lead to harmonious coexistence. She doubted whether children's rights or civil rights alone could guarantee the protection and support truly necessary for a harmonious, peaceful society (Montessori, 1979/2016).

Montessori (1949/1992, 2019a) also advocated for teaching virtues and values related to world peace and harmonious coexistence. Education can provide children with the knowledge and practice to deal well with diverse groups and cultures as adults. Knowledge, in its broadest sense, helps children develop their personality and morality (Montessori, 1941/1952, 1917/2022). Morality, knowing the difference between right and wrong, is something that Montessori (1917/2022) considered to be teachable and refined through practice and experience. According to Montessori (1949/1992), the personality of the child must be developed in such a way that it can contribute to the construction of a new society. To this end, the child should acquire knowledge and social experiences simultaneously (Montessori, 1941/1952, 1973).

An Ever-Expanding Worldview

Montessori described the child's personality development in an ever-expanding prepared environment. Such a prepared environment aims to make the adult world accessible to the child, whatever the child's stage of development. In Montessori's view, children as young as six can have constructive contributions to their environment (1941/1952), older children care for the environment and do productive work in it (1941/1952, 1949/1992), and children from the age of 12 should actively participate in society beyond school. She advocated that adolescents produce, sell, work, and experience working life by interacting with others, learning the value of money, and being part of their community (1949/1992). Through social experience and practical knowledge from the immediate environment, the child develops into a responsible citizen (1941/1952). At some point, she argued, the protected, prepared school environment no longer suffices because the older child needs an expanded environment to engage with society and further develop their moral consciousness (Montessori, 1973, 1949/1992, 1917/2022). Montessori (1949/1992) spoke of human cooperation in the global community with all people having responsibility for each other. Thus, she saw the older child's environment as the entire world, with the overarching goal of developing children into global citizens.

Conclusion

Our analysis demonstrates that Montessori was convinced a better world is possible through education. If we nurture future generations with knowledge and skills through citizenship education, they will develop well-balanced personalities with a sense of responsibility. Citizenship education can expand children's experiences and thinking, opening up new worlds and preparing them for adult responsibilities by enabling them to participate competently, morally, and reliably in society. This participation goes hand in hand with being critical and reflecting on society. Reflection enables one to consider the present in light of the common goal of humanity: living together in harmonious, peaceful ways.

To make explicit how Montessori's vision of citizenship can be expressed in education, we have drawn up design principles that can give direction to shaping citizenship education in Montessori schools. These six design principles are grounded in Montessori's view on citizenship education and address the six fundamental questions of citizenship education (see appendix). The design principles are stated in the form of if-then reasonings because multiple views on citizenship education are possible. If one thinks about citizenship education in a certain way, then this has consequences for one's educational practices. With this formulation, we encourage teachers to reflect on their own views on citizenship education and their educational practices in relation to Montessori's views. See Table 3 for the six design principles.

Discussion

Although Montessori had a very comprehensive view of citizenship education, as our results demonstrated, we must recognize that there are some gaps: aspects of citizenship education that she did not address in her work. For example, we found little in Montessori's literature about whether a Montessori school should propagate one specific perspective on good citizenship or present a vari-

Table 3

Six Design Principles to Develop Montessori Citizenship Education

What is the "why" of citizenship education?	
If you want to make the world a better place through education…	…then you will equip children with knowledge, skills, and a sense of responsibility so that they can make the changes in society that they believe are necessary and you will enable them to actively work towards a world that is peaceful and harmonious.

Who is responsible for citizenship education?	
If you believe that citizenship is a joint responsibility of all adults and that children are allowed to decide for themselves what kind of citizens they want to be…	…then you jointly represent society for the child and provide children with enough experiences so that they can form their own personalities and moralities (emancipation). You give children the space to form their own way of thinking and do not impose your own views—or way of life—upon them.

What is the ideal citizen?	
If you believe that children should adapt to today's society in order to form their own critical opinions about it…	…then you stimulate respect for other people, and cultures, and dignity—without forcing children to behave in a compliant manner. You also encourage independent thinking, a love of knowledge and work ethic, and you give them the freedom to express themselves and to take initiative.

Should citizenship education prescribe specific values and behaviors?	
If you think that children ultimately have the responsibility for peaceful and harmonious coexistence and you want to cultivate this without molding the children to your own moral image…	...then you stimulate knowledge in the broadest sense of the word and provide an environment in which children learn to think and act for themselves and develop a balanced personality, which can lead to a peaceful and harmonious world.

What is emphasized in citizenship education?	
If you believe that the emphasis in citizenship education should be on knowledge, skills, and a sense of responsibility…	…then you assume that positive attitudes are a result of acquiring knowledge and skills and an awareness of the responsibility for realizing a peaceful and harmonious society. Attention to rights is important, but it is more necessary that children understand what they themselves can do to improve society.

What is the context of citizenship education?	
If you want to develop children into citizens of the world…	…then children must gain the social experiences that allow them to understand the importance of respect for and connections with other people and cultures. They must learn to understand the world and to set and pursue collective goals that enable them to make a real and fundamental contribution to the world.

ety of perspectives. Furthermore, although it is tempting to adopt Montessori's thinking on citizenship education and align educational practice with it, we must recognize that Montessori's ideas arose in a particular time and context with specific characteristics and challenges. If she had lived today, perhaps her ideas would have been different. She could not have determined once and for all and for everyone what citizenship is. Just as the interpretation of Montessori's works must take into account the time in which she lived, the interpretation of contemporary citizenship education must take into account modern society. The society in which Montessori developed her philosophy and method has given way for a neoliberal, growth-oriented, individualistic society, which tends to isolate people and undermine the harmony and solidarity that is at the heart of Montessori's thinking (Han, 2022). The challenges for implementing Montessori's vision of citizenship education were quite different from those faced by educators today.

Neoliberal society focuses on individual success and the adapted citizen. The ideal citizen, according to this narrative, is someone who conforms to the existing societal structures, contributes to them, strives towards individual success, and does not question social conditions. What is missing in this dominant narrative, from a Montessorian point of view, is the

critical citizen—the citizen who is capable of questioning societal structures and conditions in light of the ideal of a harmonious, peaceful society. The citizen who can help change the world and shape the new society is the one who is able to deal with complex future challenges and complicated problems. The knotty question for Montessori education today is: What, in the face of these challenges, does this require of our educational practice? This is not an easy question to answer because it requires a deep and ongoing dialogue about Montessorian citizenship education. This study can provide a framework for this continued discussion.

Limitations

These conclusions are based on a review of Montessori's work. However, methodologically, our study has had several limitations. First, although we believe that the experts who contributed to the review of Montessori's work are well qualified and have done excellent work, convenience played a role in their selection and the judgement of their expertise was subjective. Second, we decided to start with a framework of views on citizenship education, which may have narrowed the panel's view on the breadth of what citizenship education may entail. Another approach could have been to study the works of Montessori inductively, without establishing a prior framework of views on citizenship education. However, the panel approach we employed required a framework to facilitate a common discourse. Third, for practical reasons, we divided the selected works of Montessori among the experts so that each work was only studied by one expert. Our analysis would be more thorough and our results more reliable if each work had been studied by multiple experts. Fourth, we could have studied Montessori's writings using digital methods and coding; however, we saw value in leveraging the expertise and experience of the panel. Although we acknowledge these limitations, the insights from this study can provide a foundation for designing and teaching citizenship education through a Montessorian lens.

Directions for Future Research
Although we now have a better understanding of Montessori's vision of citizenship education, this study leads to further research questions.

Understanding Practice
Examining citizenship education as implemented in Montessori schools may clarify to what extent theory and practice align. Furthermore, it is worth exploring whether the views of Montessori teachers match the Montessorian view on citizenship education that we found. A questionnaire with different views on citizenship education could be a means to explore this question and could provide insights into differences between countries. Comparative studies could uncover to what extent Montessori's views of citizenship are universal or are influenced by social, cultural, legal, historical, and economical national contexts.

International Input
Since our panel consisted only of Dutch experts, familiar with the Dutch context in the field of citizenship and Montessori education, future research could examine whether an international panel (including, for instance, Italian speakers) would find similar results as our Dutch panel.

Comparing Views
This study can serve as a useful foundation for comparing Montessori's views on citizenship education not only with other reform pedagogies from Montessori's own time, such as Dalton, Jenaplan, or Waldorf schools, but also with contemporary thinkers on pedagogy and education.

Citizenship is a multifaceted concept, encompassing multiple dimensions within which different conceptualizations are possible. Therefore, it is crucial that Montessori schools understand the origins of Montessori education and Maria Montessori's thoughts on citizenship education. The Dutch Citizenship Education Act gives direction to the interpretation of citizenship education but leaves schools in the Netherlands much room to shape it in their own way. The insights our study gives into the views of Montessori on citizenship education can help schools shape their citizenship education and make their thoughts explicit.

Acknowledgments

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Appendix

Framework of Views on Citizenship Education

Question	View A	View B
What is the "why" of citizenship education?	Citizenship education is important because society needs citizens with certain competencies. For instance, to deal with social issues (extremism, threats to democracy, climate change…).	Citizenship education is important because children need to get acquainted with how our society works, and children need the possibility to shape society as they wish.
	Citizenship education is important, because it can bring about social change or protect and maintain the existing social and political situation.	Citizenship education is important, so children themselves can give a destination to their own life.
	School is the place for citizenship education; it is a small society where children can practice citizenship.	School is the place for citizenship education; this is where children can study diverse social forms and types of citizenship.
	Citizenship education should bring children in contact with the complex reality.	Children should be able to have an unconcerned childhood.
Who is responsible for citizenship education?	The goals set by the school should mainly be decisive for citizenship education.	The goals set by the government should mainly be decisive for citizenship education.
	Parents/caregivers are a potential risk for democratic education.	Parents/caregivers should determine the direction of education.
	The school is primarily responsible for achieving the goals of citizenship education.	The goals of citizenship education are a joint social responsibility (of sport clubs, cultural organizations, parents, school, etc.).
	Society (government, school, parents) may decide what kind of citizen children should be.	Children themselves may decide what kind of citizen they want to be.
What is the ideal citizen?	The focus of citizenship education should mainly be on treating each other well, taking each other into account, and dealing with differences and diversity.	The focus of citizenship education should mainly be on engagement with politics and political issues.
	Citizenship education should mainly stimulate certain emotions, attitudes, and behaviors (for instance, empathy and solidarity) in children.	Citizenship education should mainly stimulate that children themselves critically think about what good emotions, attitudes, and behaviors are.
	The focus of citizenship education should mainly be on loyalty, togetherness, unity, community spirit, and sense of nationality.	The focus of citizenship education should mainly be on judging independently and critically, and civil disobedience if necessary.

Should citizenship education prescribe specific values and behaviors?	The school should propagate one specific perspective on good citizenship.	The school should present a variety of perspectives on good citizenship.
	Children should learn that a good citizen participates socially and politically. Citizenship education should, for instance, stimulate active membership of associations and organizations, voting, and civic engagement.	Children may determine themselves if they wish to be socially and politically active. You are also a good citizen when you do not participate. Individual freedom of choice is important herein.
	Children should adapt to society.	Children should learn to shape society themselves.
	Teachers should help children to change their opinion if it goes against prevailing norms, values, and views.	Teachers should not be allowed to change the opinion of children. A child may have an opinion that goes against prevailing norms, values, and views.
	Teachers should share their political and ideological preferences.	Teachers should stay neutral about their political and ideological preferences.
What is emphasized in citizenship education?	The focus of citizenship education should mainly be on attitudes and behaviors.	The focus of citizenship education should mainly be on knowledge.
	Children should learn that anger, conflict, resistance, and fight can be worthwhile as form of activism, engagement, and solidarity.	Children should mainly learn forms of peaceful decision-making.
	In citizenship education, there should mainly be attention to individual and collective rights (Rights of the Child, human rights, fundamental rights).	In citizenship education, there should mainly be attention to duties and responsibilities (obeying the law, paying taxes, working and learning, caring for each other).
	The focus of citizenship education should mainly be on learning to think about and make decisions about social problems.	The focus of citizenship education should mainly be on learning to take action towards resolving social problems.
What is the context of citizenship education?	Citizenship education should be directed to cohesion within the child's community (for instance, religion/origin/group).	Citizenship education should be directed to cohesion within society as a whole.
	It is mainly important that children are committed to the interests of their community (for instance, religion/origin/group).	It is mainly important that children are committed to the common good.
	The focus should mainly be on citizenship within the local and national context.	The focus should mainly be on citizenship within the European and worldwide context.
	At school, social issues should mainly be approached from a local or national perspective.	At school, social issues should be approached from a worldwide perspective.
	Citizenship education should be about issues within the child's world of experiences.	Citizenship education should be about issues outside the child's world of experiences.
	Citizenship education should only be about issues that the child has direct influence on.	Citizenship education should also be about issues that the child has no or only indirect influence on.

Reframing and Recontextualizing Maria Montessori's 1915 California Visit

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Abstract: Maria Montessori's visit to California in 1915—her second visit to the United States—coincided with multiple events in the region: San Francisco's Panama–Pacific International Exposition (PPIE), San Diego's Panama–California Exposition (PCE), and the National Education Association of the United States (NEA) annual meeting in Oakland. Her visit also came at a time when the American Montessori movement was splintering, and the academic elite increasingly criticized her educational model. These circumstances made Montessori's visit to California a potentially valuable opportunity to rekindle interest in Montessori education across the United States. Discussions of Montessori's visit in 1915 have been framed around her training course and demonstration school at the PPIE. Based on information from primary sources (e.g., newspapers and archival materials), some of which have been overlooked, this article asserts that her visit to California had broader implications. While her eight months in California did have a positive impact on the growth of the Montessori movement, Montessori's engagement with mainstream education had limited impact and it gave way to waning interest in Montessori education in the United States.

In 1915, Maria Montessori made her second visit to the United States. During her initial visit in 1913, her itinerary was situated around East Coast cities (e.g., Washington, D. C., New York City, and Boston; see Gutek & Gutek, 2016). This first visit to the United States was successful at inserting Montessori education into the American educational zeitgeist and it left an American audience hungry for more training courses enabling more individuals to become Montessori educators and thus establish Montessori schools. As a direct result of this, Montessori intended to return to the United States

in 1914. Due to her father's health and the outbreak of World War I, her return trip was delayed until 1915 (C. Montessori, 2015, pp. vii–x).

After her 1913 visit, the demand for more Montessori training within the United States went unsated. The primary factor inhibiting this—and an exponential spread of Montessori education—was Montessori's tight control over who was qualified to provide training courses. She asserted that training conducted by anyone other than herself was unauthorized and invalid (Gutek & Gutek, 2020; Cohen, 1972, pp. 369–370). Americans' demand

for more training courses, combined with Montessori's restrictions and the uncertainty of Montessori's return, led to some of her former students from the East Coast leading unauthorized Montessori training courses ("American Montessori training school for teachers," 1914; WES2[1]). Many of these individuals were aligned with the Montessori Educational Association (MEA), the first Montessori organization established in the United States. Learning about this, Montessori interpreted these actions as direct affronts to her declarations, and she questioned the interests and loyalty of the leaders of the American Montessori movement—specifically, the MEA and its affiliates (e.g., Samuel S. McClure, Alexander Graham Bell, Mabel Hubbard Bell, and Anne E. George; Gutek & Gutek, 2020). The MEA was directly involved in Montessori's 1913 trip to the United States, but these actions related to training course offerings, among others, led to a rift and resulted in Montessori's decision to rebuff their involvement in her 1915 visit (Cohen, 1972; Gutek & Gutek, 2020; Povell, 2010, pp. 101–102). Additionally, in 1915, Montessori issued a formal declaration regarding the establishment of Montessori associations which, as Cohen (1972) asserted, "disavowed the MEA" (p. 369). According to Cohen (1972), this declaration, titled "General Regulations for the Formation of an Authorized Montessori Society," had specific clauses declaring that Montessori would have complete control over the creation of any Montessori society (pp. 369–370). These events thrust the American Montessori movement into an existential crisis.

Regardless, Montessori was intent upon visiting America to share her educational Method with the masses. While her 1913 visit to the East Coast was primarily geared toward the private sphere, her 1915 visit to the West Coast focused on the public sphere as well as general appeal.

Coming to America

Maria Montessori and her son, Mario Montessori (the Montessoris), traveled to California at a convergence of national and international events happening across the region. There were two world's fairs, the Panama–Pacific International Exposition (PPIE) in San Francisco and the Panama–California Exposition (PCE) in San Diego, as well as the National Education Association of the United States (NEA) annual meeting in Oakland, which coincided with an International Congress on Education also in Oakland. During her visit to California, Montessori attended and lectured at these events in addition to delivering speeches and courses in other cities across the Golden State (e.g., Los Angeles and Pasadena).

The PPIE and the PCE were both large world's fairs organized to celebrate the completion and opening of the Panama Canal. The PPIE took place during most of 1915 in San Francisco and, somewhat confusingly, the PCE happened in San Diego during the same general period. While both events were world's fairs, the PPIE was much larger in scale and notoriety. Many of the secondary sources that discuss this period of Montessori's biography emphasize the role of her participation in the PPIE, going so far as to frame it as the crux of her travels (Bonsteel, 1995; Buckenmeyer, 2018; Kramer, 1976) while some sources have generally overlooked her involvement in the PCE (Gutek & Gutek, 2020; Kramer, 1976; Standing, 1998).

Simultaneous to these overlapping events in California, World War I was underway in Europe, and Montessori's relationship with her original East Coast American disciples and the MEA was disintegrating. While her 1913 visit was sponsored and coordinated by the MEA and Samuel S. McClure (see Gutek & Gutek, 2016), her 1915 visit purposely avoided their involvement. Instead, she relied on financial support from the wealthy family of Adelia McAlpin Pyle, Montessori's former student and an ardent disciple. Mario Montessori, other former students (e.g., Katherine Moore and Helen Parkhurst), and her longtime friend Anna Fedeli also assisted her (Gutek & Gutek, 2020, pp. 190–192).

Her visit also came at a time of personal and professional tumult. Her father, Alessandro Montessori, was ailing and her relationship to her son, Mario, who had been born out of wedlock, was becoming increasingly discussed in the American press.[2] On the professional side, in addition to the rift with the MEA, 1915 was the year that William Heard Kilpatrick published his highly critical evaluation of the Montessori education Method, *Montessori Examined*. Kilpatrick was a highly influential pedagogue who wielded immense power over the educational practices in the United States from his

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[1] All newspaper articles with unknown authorship have been assigned an alphanumeric identifier, based on the publication name, which are referenced in-text. These references and identifiers are listed in the "Newspaper Articles" subsection of the reference list.

[2] Across different news reports, he was identified as her nephew, cousin, adopted son, or son. For further details regarding the evolution of Maria's and Mario's relationship, see Babini & Lama (2000, pp. 107–109).

professorship position at Teachers College (New York). In his evaluation of the Montessori Method, Kilpatrick was paradoxically critical of the freedom given to children to pursue their interests while simultaneously critiquing the structured use of the didactic materials.

Despite these hardships and challenges, Montessori was hopeful about the expansion of her educational Method (SFC4). A newspaper article from 1914 quoted Montessori as being "enthusiastic about America," and went on to explain that "the United States was the country where she expected to see her method of educating the young brought to perfection" (NYT1). Clearly, she approached her visit to America with optimism, seeing it as a valuable opportunity to expose her Method to a wider audience.

Historical Reevaluation

The recent digitization, transcription, and indexing of primary source materials, such as newspapers and other archival sources, has made it possible to expand, reframe, and reconcile the historiography of Montessori's 1915 visit to the United States. The following sections present the timeline of events as supported by primary source materials while critically evaluating the accounts included in the previously discussed secondary sources. By reconciling primary sources with secondary sources, this article seeks to provide more clarity concerning Montessori's travels and to document the impact of her visit.

The Montessoris' itinerary was hectic and appears to have been in a constant state of flux, which understandably caused confusion among both secondary and primary sources. Kramer (1976) asserted that the trip to California was "under the auspices of the [NEA] to demonstrate her work to educators and the public at the Panama–Pacific International Exposition," yet did not include evidence to support this claim (Kramer, 1976, p. 212). Buckenmeyer (2018, pp. xi–xiv) affirmed the lack of evidence for Kramer's claim. Cohen (1972) asserted that the Montessori Alumnae Association in Los Angeles was the organization that planned Montessori's visit, also neglecting to include supporting evidence.

Some authors have wrestled with the question of who deserves credit for the invitation, arrangement, and planning of the Montessoris' travel (Buckenmeyer, 2018; Gutek & Gutek, 2020; Kramer, 1976; C. Montessori, 2015). Secondary sources provide no evidence-based answers, though primary sources indicate there may have been a combined effort among a number of organizations

and individuals: Adelia Pyle (a former student living in New York who was from a wealthy family), Alvin E. Pope (Chief of the Department of Education and Acting Commissioner General in New York City for the PPIE), the NEA, Katherine Moore[3] of Los Angeles (a former student and leader of the Montessori Alumnae Association in Los Angeles), the Dante Alighieri Society, J. H. Francis (Superintendent of Los Angeles City Schools), Jesse F. Millspaugh (President of the Los Angeles State Normal School[4]), George F. Bovard (President of the University of Southern California), and the California State Board of Education.

While several sources asserted that Montessori went to California specifically to participate in the PPIE (Gutek & Gutek, 2020; Kramer, 1976; Standing, 1998), other evidence points to her primary destination being Los Angeles (and adjacent Pasadena) with plans to participate in the PCE (LAH5; LAR1). Based on press reports, their itinerary was constantly fluctuating as plans developed (LAH5; LAH6; LAT2; LAT3; NYT3). Montessori's personal letters, as well as contemporary news reports, indicate that she did not fully commit to attending the PPIE in San Francisco until early June (C. Montessori, 2015, pp. 30–35). While a news report from October 1914 indicated Montessori had committed to participate in the PPIE, many of Montessori's plans had changed in a year ("Educational news and editorial comment," 1914). Whereas Montessori's visit to the United States in 1913 was focused on private education, her 1915 visit focused more on public education.

Italy to New York

The Montessoris embarked from Naples, Italy aboard the steamship *Duca degli Abruzzi* on April 7, 1915, bound for New York (NYSun1; NYTrib1). According to the passenger list (see Figures 1a and 1b), Mario, listed under his father's last name, Montesano, was visiting a "relative or friend" identified as "Ms. Moore Catherine, Los Angeles," while Montessori's entry indicated that she was visiting "nobody" (Ancestry.com [*Duca degli Abruzzi* passenger list], 2010). The passenger list provided information that other sources had overlooked. With this information, the Montessoris' intended destination

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[3] At least four different spellings of her name have been encountered. "Katherine Moore" was the most common form used across primary sources, including her listing in both the 1915 and 1916 Los Angeles City Directories (Los Angeles Directory Company, 1915, 1916).
[4] The predecessor to University of California, Los Angeles.

Figure 1a
Duca degli Abruzzi Passenger List – Maria Montessori and Mario Montesano (page 1)

| Line # | NAME IN FULL | | Age | | Sex | Married or Single | Calling or Occupation | Able to— | | Nationality | Race or People | Last Permanent Residence | | Name and complete address of nearest relative or friend in country whence alien came | Final Destination | |
	Family Name	Given Name	Yrs.	Mos.				Read	Write			Country	City or Town		State	City or Town
2	Montessori	Maria	44	7	F	S	Physician	Yes	Yes	Italy	Italian South	Italy	Chiaravelle	[illegible]	USA	New York
3	Montesano	Mario	17	0	M	S	Student	Yes	Yes	Italy	Italian South	Italy	Rome	[illegible]	USA	New York

Figure 1b
Duca degli Abruzzi Passenger List – Maria Montessori and Mario Montesano (page 2)

| Line # | Whether having a ticket to such final destination | By whom was passage paid? | Whether in possession of $50, and if less, how much? | Whether ever before in the United States; and if so, when and where? | | | Whether going to join a relative or friend; and if so, what relative or friend, and his name and complete address | Ever in prison... | Whether a Polygamist | Whether an Anarchist | Whether coming by reason of any offer, solicitation, promises, or agreement, express or implied, to labor in the United States. | Condition of Health, Mental, and Physical | Deformed or crippled. Nature, length of time, and cause | Height | | Complexion | Color of— | | Marks of identification | Place of birth | |
				Yes / No	Year or period of years	Where?								Feet	Inches		Hair	Eyes		Country	City or Town
2	Yes	By myself	Yes	Yes	1913	New York, Chicago	Nobody	No	No	No	No	Good	No	5	2	Healthy	Brown	Brown	None	Italy	Chiaravell
3	Yes	By myself	Yes	No	—	—	Ms. Moore Catherine, Los Angeles	No	No	No	No	Good	No	5	7	Healthy	Brown	Brown	None	Italy	Rome

appears to have been Los Angeles where they would rendezvous with Katherine Moore.

After 12 days at sea during wartime, the Montessoris arrived at the Port of New York on April 19 (ITA5; NYSun1; NYTrib1; WES1). Upon their arrival, the Montessoris were welcomed by former students, Montessori disciples, and others. Cohen (1972, pp. 368–369) asserted that Anna Fedeli traveled with the Montessoris, and that Helen Parkhurst was present to welcome them. While Fedeli and Parkhurst did meet up with the Montessoris, primary sources confirm they did so in California and were not present in New York (Ancestry.com [*Ancona* passenger list], 2010; C. Montessori, 2015, pp. 33, 39; SPJ3).

New York to San Francisco to Los Angeles

The Montessoris' brief stay in New York was documented in secondary sources (Cohen, 1972; Gutek & Gutek, 2020; C. Montessori, 2015) and an analysis of primary sources confirms the majority of the details. However, in one instance, Cohen (1972) incorrectly reported "[the Montessoris] came straight to Los Angeles" after their arrival in New York (p. 369). To the contrary, a day after their arrival in New York, Montessori participated in a conference at a Children's House located in a tenement housing complex[5] at 520 E. 77th Street, which was established by the New York chapter of the MEA (Gutek & Gutek, 2020, pp. 223–224; Rodman, 1915). Sources also revealed that one of Montessori's former pupils, Margaret Naumburg, was present at the conference and eagerly informed Montessori that she had received approval to begin a Montessori classroom at New York's Public School 4 (PS4), which must have been encouraging news to Montessori (Gutek & Gutek, 2020, pp. 223–224; Rodman, 1915).

On April 21, two days after their arrival, the Montessoris and Adelia Pyle visited the Bronx to see Angelo Patri at Public School 45 (PS45) where he was the principal.[6] Then, in the afternoon, the Montessoris and Pyle were aboard a Chicago-bound train (C. Montessori, 2015, pp. 2–6). Upon their arrival in Chicago, they went to the Blackstone Hotel, where her former students

held a reception in her honor (C. Montessori, 2015, p. 4). Afterward, they boarded a San Francisco-bound train and arrived in Oakland on the morning of April 25 (C. Montessori, 2015, p. 5; SFC5). They reached San Francisco by ferry, where they were driven by automobile to a "suite of rooms" at the Inside Inn[7] (SFC5; SFCP3). Montessori also managed to attend two events in her honor later that day (ITA3; ITA6; C. Montessori, 2015, pp. 13–16; SFC5; SFC6; SFCP2; SFCP3). Three days later, they traveled to Los Angeles.

Los Angeles and its Environs

Several secondary sources have discussed Montessori's time in the Los Angeles area (Buckenmeyer, 2018; Cohen, 1972; Gutek & Gutek, 2020; C. Montessori, 2015) and, for the most part, the details concur with primary sources. One report asserted that the Montessoris arrived in Los Angeles on April 26 (C. Montessori, 2015, p. 12), though the consensus among primary sources is that they arrived April 28 (LAE2; LAH2; LAR2; LAT4).[8] Upon their arrival in Los Angeles, they immediately traveled to the Hotel Maryland in Pasadena (LAE2). This hotel was of interest because it was the location of a Montessori class established by one of her former students, Mildred Johnston (LAH1; LAR2; LAT4). There were two other Montessori classes in the area, both established by Katherine Moore: St. Catherine's School (636 W. Adams St.) and Seventh Street School (1822 E. 7th St.; LAR2). St. Catherine's School was a private school, but the Seventh Street School was a public school in Los Angeles and is notable because it has been credited as the first instance of a public Montessori program in the United States (Price, 1915).

An element of Montessori's travels that has not been documented in secondary sources was her brief side trip to San Diego to consult on plans for the Montessori Institute at the PCE (SDET6). On May 2, the Montessoris and their contingent, including Adelia Pyle and Mary Powell Jordan, traveled to San Diego (SDU5, p. 1). Their visit lasted less than 36 hours, but it was important because it helped lay the groundwork for Montessori's involvement in the PCE and gave them an opportunity to tour some of the local schools (SDET1).

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[5] A picture of children at "a Montessori school for the children of New York's East Side" was printed in the pages of *Outlook* magazine (March 10, 1915, p. 579). It's plausible that this is the same school that Montessori visited.
[6] For information about Angelo Patri and his role in New York public schools, see Wallace (2005).

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[7] Inside Inn was a hotel located within the grounds of the PPIE.
[8] One report indicated Montessori and her fellow travelers were met by Katherine Moore in San Francisco to escort them to Los Angeles (LAH2).

Upon their arrival in San Diego in the afternoon of May 2, they were met by Duncan MacKinnon, San Diego's superintendent of city schools, who escorted them to the PCE grounds (LAT8; SDU3).

On May 3, the Montessoris and their contingent returned to Los Angeles, where they attended a few social engagements held in honor of Montessori that demonstrated a clear public interest in her work. On May 6, Montessori was honored in Pasadena at a dinner event and at a public reception hosted by the Pasadena Board of Trade (LAE5). On May 14, Montessori attended a meeting of the Friday Morning Club, a local women's club (LAT9). Montessori spoke at the Castelar Street School on May 19, and she attended a celebration that evening at the Los Angeles High School auditorium (ITA7; LAE3). She was also an honored guest at the inaugural meeting of University of Southern California's Scholarship Society where she delivered a speech through an interpreter about her educational Method (WN1; WN2; LAE3; LAH4; LAT1; LAT7).

In addition to these public events, Montessori conducted a series of 10 public lectures given across six weeks, held at Los Angeles' Olive Street School (419 S. Olive Street) beginning on May 27 (LAE4; LAH3; LAT6). According to Buckenmeyer, the first lecture (May 27) and the fifth lecture (June 9) of this series pertained to "the social liberation of the child" (Buckenmeyer, 2018, pp. 3, 15–22). Buckenmeyer also indicated that the sixth lecture (June 10) in this series focused on "the social rights of the child and the *Casa dei Bambini*, Rome, Italy" (2018, pp. 3, 23–29).

Concurrently with these public events and appearances, Montessori was engaged in the first part of the third International Training Course[9], which took place in Pasadena, Los Angeles, and at the PCE in San Diego (National Montessori Promotion Fund, 1916). The course commenced in Pasadena at the Montessori class at Hotel Maryland on May 8 (LAT5). The remainder of the Los Angeles courses were held at the Boyle Heights Intermediate School (LAH8). The Los Angeles City Schools administration made special arrangements for Montessori to engage 30 children from the Seventh Street School for the course held at the Boyle Heights Intermediate School. The children, transported to the location via automobile, "represent[ed] seven or eight nationalities, none Americans," and reportedly began

each day by being bathed and dressed at the Seventh Street School (Price, 1915).[10] According to Buckenmeyer (2018), Montessori delivered a lecture on May 12 about the Montessori materials, which was likely part of the training course, but this connection was not confirmed (2018, pp. 3, 11).

Meanwhile, Montessori solicited the help of Helen Parkhurst, a former pupil and professor at Wisconsin State Normal School in Stevens Point. Parkhurst took a leave of absence and joined the Montessori contingent in Los Angeles to assist with the training courses (SPJ3). Additionally, Montessori had written to her longtime friend Anna Fedeli in Italy, who was looking after her father, requesting she join them in California (C. Montessori, 2015, pp. 27–28). Records indicate that Fedeli departed Naples, Italy on May 26 aboard the *Ancona* bound for New York. She arrived on June 8 and continued westward by train to Los Angeles (Ancestry.com [*Ancona* passenger list], 2010; see Figures 2a and 2b).[11] Montessori's letters place Fedeli's arrival in Los Angeles as June 13 (C. Montessori, 2015, pp. 33, 39).[12]

Comparing secondary and primary sources related to the Los Angeles leg of the Montessoris' trip revealed that only part of the story was documented. Facts about their time in Los Angeles were scattered across secondary sources without a clear consensus. By connecting these facts into a detailed chronology here, it becomes apparent that Montessori's time in Los Angeles was notable for a few reasons: the third International Training Course began there; she recruited public school children to demonstrate her methods; and it became a proving ground for events at the PCE and PPIE.

San Diego and the Panama–California Exposition

The Montessoris and their contingent of Anna Fedeli, Adelia Pyle, Helen Parkhurst, Helen Little, Edith Little, and Mary Powell Jordan arrived in San Diego on June 28, where they stayed for the month of July (SDET8).

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[9] The National Montessori Promotion Fund (1916) identified this course as "1st California Class 1915."

[10] Price's statement reflects the prevailing attitude of the time that ethnicities and nationalities were distinct and nonoverlapping, along with the exclusionary idea that White people were true "Americans."
[11] C. Montessori (2015, p. 30) indicates that Fedeli departed Naples on May 27.
[12] Gutek and Gutek (2020, p. 188) asserted that Fedeli arrived in Los Angeles on June 19, and they cite C. Montessori (2015, p. 39) as their supporting evidence. Gutek and Gutek (2020) miscalculated or confused the dates.

Figure 2a
Ancona Passenger List – Anna Fedeli (page 1)

LIST OR MANIFEST OF ALIEN PASSENGERS FOR THE UNITED STATES IMMIGRATION OFFICER AT PORT OF ARRIVAL
S. S. *Ancona* sailing from **NAPLES, May 26th, 1915** | Arriving at Port of **NEW YORK**, **[8 Jun 1915]**

List #	NAME IN FULL		Age		Sex	Married or Single	Calling or Occupation	Able to—		Nationality (Country of which citizen or subject)	Race or People	Last Permanent Residence		The name and complete address of nearest relative or friend in country whence alien came
	Family Name	Given Name	Yrs.	Mos.				Read	Write			Country	City / Town	
2	Fedeli	Anna	31	—	F	S	Professor	Yes	Yes	Italy	Italian South	Italy	Rome	Alessandro Montessori 25 via Conte Rosso - Rome

Figure 2b
Ancona Passenger List – Anna Fedeli (page 2)

LIST OR MANIFEST OF ALIEN PASSENGERS FOR THE UNITED STATES IMMIGRATION OFFICER AT PORT OF ARRIVAL
S. S. *Ancona* sailing from **NAPLES, May 26th, 1915** | Arriving at Port of **NEW YORK**, **[8 Jun 1915]**

List #	Final Destination		Whether having a ticket to such final destination	By whom was passage paid?	Whether in possession of $50, and if less, how much?	Whether ever before in the United States; and if so, when and where?			Whether goin to join a relative or friend; and if so, what relative or friend, and his name and complete address	Ever in prison...	Whether a Polygamist	Whether an Anarchist	Whether coming by reason of any offer, solicitation, promises, or agreement, express or implied, to labor in the United States.	Condition of Health, Mental and Physical	Deformed or crippled. Nature, length of time, and cause	Height		Complexion	Color of—		Marks of identification	Place of birth	
	State	City / Town				Yes / No	Year or period of years	Where?								Feet	Inches		Hair	Eyes		Country	City / Town
2	California	Los Angeles	Yes	By myself	Yes	No	—		Mrs. Maria Montessori Hotel Maryland	No	No	No	No	Good	No	5	4	Healthy	Brown	Brown	None	Italy	Senigallia

Reportedly, they were also joined by "a private class composed of fifty young girls from all parts of the United States" (SDET8; see Appendix C). The Montessoris' time in San Diego has received limited attention; only some secondary sources have included brief discussions (Buckenmeyer, 2018; Kramer, 1976; C. Montessori, 2015). Regardless of the reason for this, the Montessoris' travel to San Diego was confirmed in newspaper reports (as early as March 1915), which indicated Montessori would conduct a training course at the PCE (LAH7; LAR1; SDET4). Their participation in the PCE was significant because it built on their experience from Los Angeles and served as a warm-up or practice for the larger PPIE.

Montessori's arrival was inaugurated with a lecture she delivered in Italian and interpreted by Pyle for an audience of 50 students (SDET2; SDET3). Similar to her public lectures in Los Angeles, Montessori planned a short course of lectures and demonstrations "for the benefit of mothers, teachers, and all others interested," but these plans were canceled due to time constraints (Robinson, 1915; SDET3; SDU4). The Montessori training course in San Diego, a continuation of the first part of the third International Training Course, began on Thursday, July 1, and was conducted on Tuesdays and Thursdays at 3:30 p.m. at the San Diego State Normal School[13] in conjunction with a summer school program (Robinson, 1915; SDET8; SDU1; SDU7). Fedeli, Parkhurst, and Helen Little conducted a demonstration Montessori class on Mondays and Wednesdays (SDU7; SDET3).[14] Initially, the demonstration class was planned for the Exposition grounds (GEN1; ODJ2). On July 12—Educational Day at the PCE—Philander P. Claxton and Maria Montessori both delivered speeches at the Spreckels Pavilion (LAE1; C. Montessori, 2015; SDET5; SDET10; SDU2). This booking with the U.S. Commissioner of Education probably sparked interest in the Montessori Method amongst the general public.

Conducting a course in connection with the PCE at the San Diego State Normal School and participating in special events at the PCE were valuable opportunities for Montessori to present her educational Method to a new and receptive audience. After concluding the training course at the PCE, Montessori and her contingent headed north to San Francisco where they applied their experience at the PCE to their program at the PPIE.

San Francisco and the Panama–Pacific International Exposition

This portion of Montessori's 1915 visit is well documented across several secondary sources (Bonsteel, 1995; Buckenmeyer, 2018; Cohen, 1972; Gutek & Gutek, 2020; C. Montessori, 2015; Sobe, 2004). Additionally, as the PPIE drew much press coverage, information concerning Montessori's participation in the Exposition was readily available. Yet, like other aspects of her visit to California, some details have been overlooked, inaccurately portrayed, or inconsistently reported.

By the end of July, news reports declared Montessori had decided to extend her California visit, indicating that Montessori and Fedeli would conduct a training course at the PPIE from August through November (NYT2). In letters to her father, Montessori described weighing the decision to extend her visit to conduct the course, specifically emphasizing the financial aspects (C. Montessori, 2015, pp. 48–51). Arriving in San Francisco on August 1, Montessori and her contingent hit the ground running. The following morning, Montessori commenced the second part of the third International Training Course at the PPIE[15] and, a few days later, the demonstration classroom opened under the direction and supervision of Parkhurst (ITA1).[16] The demonstration classroom in the Palace of Education, often referred to as the "glass house," included theater-style seating to encourage visitors to observe the Montessori system in action (see Figure 3; Bonsteel, 1995; Hinkle, 1915; Sobe, 2004). The class of 30 children was selected from an application pool of approximately 2,500 and news reports provided a list (see Appendix B) of those who were enrolled in the demonstration class (Buckenmeyer, 2018, pp. 254–255; ITA10; SFC2). This large application pool once again demonstrated the public interest in the Montessori Method.

[13] The predecessor to what is currently San Diego State University.
[14] For a list of the children who participated in the San Diego demonstration class, see Appendix A.

[15] National Montessori Promotion Fund (1916) identified this course as "2nd California Class 1915."
[16] Cohen (1972) reported the demonstration school was conducted by Montessori herself with assistance by Moore and Parkhurst (p. 369), yet primary sources refute this, and no contemporary evidence has been located to support the assertion that Moore accompanied the Montessoris to San Francisco. Cohen cited a source from October 1914 to support this claim (see "Educational news and editorial comment; American Montessori courses," 1914), though many details of Montessori's itinerary were not finalized at that point. Contemporary news reports from August through December 1915 do not indicate Montessori supervised the demonstration school, but reports confirm that Parkhurst was the supervisor (Hinkle, 1915).

Figure 3

Montessori Demonstration Classroom, PPIE, San Francisco

Located in the Palace of Education, this is an interior view of the Montessori demonstration classroom with children gathered around a table and adults standing in the background. Records indicate there were 30 children enrolled in the class yet there are 35 children seated at the table in this photo. The adults standing in the background include Maria Montessori, Adelia Pyle, Helen Parkhurst, Anna Fedeli, and Mario Montessori, among others. Just beyond the windows, an audience is peering in, watching the young children. Though this photograph does not include a specific date, it was likely taken on the classroom's opening day, August 4, 1915. Source: Edward A. Rogers Panama–Pacific International Exposition photograph collection, University of California, Berkeley, Bancroft Library (BANC PIC 2015.013:15989--NEG). https://oac.cdlib.org/ark:/13030/k6zp4dxk

Montessori devoted her time to conducting lectures for educators (the training course), limited to 30 pupils each, and held in various State buildings across the exposition grounds four times a week. Demonstrating the level of interest from educators, reports indicate around 1,800 students applied (SFC3; SFC7; SFE1; Todd, 1921, vol. 4, p. 68). Similar to the PCE, the PPIE training courses were conducted by Montessori in Italian, aided by Fedeli, who served as her assistant, and Pyle, who served as her interpreter (ITA4; SDU7; SFCP4). August 5th was the day of the first training course at the PPIE, which took place in the Nevada State Building; subsequent lectures were delivered at other State buildings (ITA9; SFC3; Todd, 1921, vol. 4, p. 68). Ultimately, the training course in San Francisco spanned from August through November, but the official number of classes held remains elusive.

Montessori and her colleagues spent considerable time preparing for the PPIE, and their efforts yielded some direct impacts. For example, some students who took the training course went on to disseminate the Montessori Method of education to part of China (Chen & Liu, 2023; SFCP1; SFCP5; SFCP6). Additionally, the PPIE provided ample opportunity to expose the general public to Montessori's methods in a classroom where they could observe the Method in action.

Oakland and the National Education Association Annual Meeting

While her travels and activities in San Francisco at the PPIE are well documented, her time in Oakland at the NEA Annual Meeting is less widely documented in secondary sources despite the coverage in primary sources. Buckenmeyer (2018) and Cohen (1972) both include some details while overlooking others and perpetuating some inaccuracies. For example, Buckenmeyer (2018) included the transcript of a speech, which he identified as "Oakland lecture: Biological liberty and the psychic development of the child" and dated August 28, 1915, though no context for the speech was provided. An examination of the conference program and the speech transcript establishes that the speech was delivered during the Montessori Congress (Buckenmeyer, 2018, pp. 241–247; NEA, 1915b).

The NEA's 53rd Annual Meeting was held in Oakland, August 16–27, at the newly constructed Municipal Auditorium (or, Civic Auditorium) and at Hotel Oakland. The NEA was founded in 1857 as the

National Teachers Association and became formally known as the NEA in 1870.[17] Then it was chartered by the U.S. Congress in 1906 (Selle, 1932). By 1915, the NEA was the largest organization of education-related professionals in the United States. In an historical account of the NEA, West (1980) explained how the strength and importance of the NEA was exerted through their conventions, publications, and the recommendations of their committees. These committees were tasked with recommending "a course of study for high schools; [preparing] an ideal program for the education of youth; and [reporting] on school registers and annual reports" (West, 1980, p. 7). Since it was the largest organization representing the interests of educators in the United States at the time, the NEA wielded substantial influence on members' and policymakers' practices related to the public education system. This influence specifically concerned pedagogical practices, and the Montessori Method of education had piqued their interest. The event was well attended by an international gathering of between four and five thousand educators, including Montessori (SU1). Thus, the involvement of Montessori and her allies had the potential to insert the Montessori Method into public schools across the country. Overall, Montessori delivered four speeches at the NEA meeting. The transcripts were published in the conference proceedings (see M. Montessori, 1915a, 1915b, 1915c, 1915d).

In conjunction with the NEA meeting and the related International Congress on Education, there was also a Montessori Congress held August 28 in the ballroom of Hotel Oakland.[18] The program for the conference indicates that David Starr Jordan (President of the NEA) presided over the Montessori Congress, which, in addition to a speech by Montessori, included speeches by Edward L. Hardy and Arthur H. Chamberlain (Secretary of the California Council of Education and California Teachers' Association).[19] According to the

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[17] The conference program, published prior to the event, listed August 16–28 but the subsequently published proceedings listed August 16–27 (NEA, 1915a, 1915b).

[18] Cohen (1972) documented Montessori's participation in the NEA annual meeting; however, his account lacked information about her participation in the International Congress on Education and Montessori Congress.

[19] Claxton did not attend, but one of his representatives was in attendance to deliver prepared remarks (ITA2). Hardy's speech was titled "Possibilities and Opportunities of the Montessori Work for American Children," and Chamberlain's was titled "The Future of the Montessori School in America" (NEA, 1915b, pp. 42–43).

program, Montessori delivered an untitled "Address" at the Montessori Congress on August 28 (NEA, 1915b, pp. 42–43). Buckenmeyer (2018) included a speech transcript dated August 28, which revealed itself as the speech Montessori delivered to the Montessori Congress in the Hotel Oakland ballroom (ITA2).[20]

It is unclear if any immediate impact or action resulted from Montessori's participation in the NEA meeting. Regardless, her presence was important because it provided her the opportunity to share her Method with a large audience of influential educators and policymakers.

After the Expositions

Over the course of her 1915 visit to the United States, Maria Montessori received numerous invitations from across the nation to visit various cities and conduct lectures or courses. In addition to others, invitations came from New York, Washington, D.C., Portland, Oregon, and Stevens Point, Wisconsin (ODJ1; ODJ2; SPJ1; SPJ2; SPJ4; SPJ5). This widespread interest demonstrates how educators, and the American public, were interested in the Montessori Method of education. However, beside speaking at a conference in New York, her itinerary was solely focused on California. These invitations from outside California were rebuffed, except for Stevens Point, Wisconsin, which received serious consideration (SFC1; SPJ1; SPJ2; SPJ5).

Stevens Point was considered because Montessori's assistant and confidante Helen Parkhurst was on the faculty of the Wisconsin State Normal School at Stevens Point, and Montessori was offered a position there. She would be able to continue her training courses and related work with a steady salary and institutional support (SPJ1; SPJ2; SPJ5). Interestingly, the faculty position was negotiated, agreed upon, and contracts signed; Montessori was set to begin in January 1916 (SPJ5). But this arrangement never became a reality. Ultimately, Montessori canceled the Stevens Point contract and departed America to accept an opportunity in Spain (NYTrib2; SS1).

The reasoning for her change of plans is unclear, but

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[20] The August 28 speech transcript included in Buckenmeyer (2018) is identified by two distinct titles: (1) "Montessori's address to the N.E.A. national meeting: Learning and developmental freedom of the child," and, (2) "Biological liberty and the psychic development of the child," (pp. 4, 241).

several news reports provide some insight. According to one report, Montessori had been offered a large sum of money to establish her system in Spain's primary schools (NYTrib2). In another, a note from Montessori's secretary to the California State Board of Education indicated she left for Spain "heartbroken over the harsh treatment she was accorded in California" and that she "cancelled all her contracts in this country" (SS1). Another account indicated Montessori's plans changed due to her father's death and concluded by mentioning a congratulatory note acknowledging the kindness shown to her (ITA8). The harsh treatment which Montessori references is unclear, but it is possible this relates to remarks by Edward Hyatt (Secretary, California State Board of Education), who characterized her Method as a fad or a passing fancy (Hyatt, 1915). These inconsistencies across primary sources are difficult to reconcile.

Discussion and Conclusion

Historically, literature pertaining to Maria Montessori's 1915 California visit have framed the conversation around her participation in the PPIE. While this was probably the most widely documented aspect of her California visit, it was only a fraction of the time she spent in California. Misunderstandings, inconsistencies, and oversights regarding Montessori's California itinerary occurred. Though Montessori's intent to take a faculty position at Wisconsin State Normal School was previously documented (see Gutek & Gutek, 2020), the details of this decision are one of the most unreported aspects of her time in America in 1915. Her brief visit to San Diego in early May and her month-long sojourn there in July are other periods of her time in California that have generally been overlooked. Additionally, primary sources indicated that Montessori actually conducted two separate training courses during her time in California in 1915 (National Montessori Promotion Fund, 1916).

By examining the historiography associated with this part of Montessori's biography through primary and secondary sources, the inconsistencies have been examined to achieve a more accurate record. Beyond reframing the historiography, this article also sought to examine the impact of Montessori's travels to California in 1915. 1915 was a time of both personal tumult and progress for Montessori education and the Montessori movement in the United States. While it is tough to quantify the impact of her visit, a few points are clear.

Prior to Montessori's visit to California in 1915, a relatively small number of Americans were trained under the tutelage of Montessori. Her visit changed this trend, and it made training more accessible to Americans, especially those on the West Coast. Meanwhile, participation in both the PCE and PPIE increased the notoriety of her educational Method in the United States. Further, her training course at the PPIE had a direct impact on the diffusion of Montessori education in America and even overseas to China (Chen & Liu, 2023; "Colony celebrates anniversary," 1915, p. 19; National Montessori Promotion Fund, 1916; SFCP1; SFCP5; SFCP6). While we can only speculate, it seems plausible that if Montessori had followed through with her faculty position at the Wisconsin State Normal School in Stevens Point, the historical trajectory may have been different; the advancement of her Method across the United States may have taken a stronger foothold.

Reframing Montessori's 1915 visit to California by challenging our understanding of Montessori's biography potentially paves the way for other avenues of research. For instance, another Montessori demonstration school was established at the PCE in the summer and fall of 1916 (SDU6). Montessori's return to the United States in 1917, where she delivered another series of lectures in San Diego, has received limited analysis (see Cohen, 1972; Moretti, 2013, 2021). Another area requiring deeper analysis is the lasting impact of her 1915 courses on teachers and schools in California and beyond. Given the new resources and information that are becoming accessible, it may be time to reconsider and reevaluate more details of her biography and the diffusion of Montessori education across the United States.

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Newspaper Articles

Note: This list includes newspaper articles with unknown authorship. They have been assigned an alphanumeric identifier, based on the publication name, which have been referenced in-text.

Glendale Evening News (GEN)

GEN1. Exposition notes. (1915, May 27). https://archive.org/details/c100_2012_019/page/n13/mode/2up

L'Italia (ITA)

ITA1. All'esposizione fu iniziato ieri il corso educativo della Dottoressa Montessori. (1915, August 5). 4. https://chroniclingamerica.loc.gov/lccn/sn85066408/1915-08-05/ed-1/seq-4

ITA2. Il congresso Montessori a Oakland: Il metodo educativo della Dr. Montessori discusso ed esaltato dagli insegnanti Americani. (1915, August 30). 4. https://cdnc.ucr.edu/?a=d&d=ITA19150830.2.35

ITA3. La D.ssa Montessori nella nostra città. (1915, April 26). 5. https://cdnc.ucr.edu/?a=d&d=ITA19150426.2.35

ITA4. La Dr. Montessori a San Francisco: L'illustre pedagogista iniziera' oggi il corso delle sue lezioni all'esposizione. (1915, August 2). 4. https://cdnc.ucr.edu/?a=d&d=ITA19150802.2.37

ITA5. Maria Montessori a New York: Essa rimarrà in America 4 mesi e verrà direttamente in California. (1915, April 21). *L'Italia*, 1. https://cdnc.ucr.edu/?a=d&d=ITA19150421.2.3

ITA6. Maria Montessori a San Francisco. (1915, April 25). 4. https://cdnc.ucr.edu/?a=d&d=ITA19150425.2.36

ITA7. Maria Montessori festeggiata a Los Angeles. (1915, May 24). 8. https://cdnc.ucr.edu/?a=d&d=ITA19150524.2.48

ITA8. La partenza di Maria Montessori. (1915, December 3). 4. https://cdnc.ucr.edu/?a=d&d=ITA19151203.2.37

ITA9. La prima lezione della Montessori alle maestre. (1915, August 6). 4. https://chroniclingamerica.loc.gov/lccn/sn85066408/1915-08-06/ed-1/seq-4

ITA10. La scuola Montessori. (1915, August 6). 4. https://chroniclingamerica.loc.gov/lccn/sn85066408/1915-08-06/ed-1/seq-4

Los Angeles Express (LAE)

LAE1. Addresses teachers. (1915, July 13). 8. https://www.newspapers.com/image/608012921

LAE2. Dr. Montessori reaches L.A. (1915, April 30). 8. https://www.newspapers.com/image/608093561

LAE3. Dr. Montessori to address U.S.C. body. (1915, May 20). 7. https://www.newspapers.com/image/608014747

LAE4. Dr. Montessori to talk. (1915, May 25). 6. https://www.newspapers.com/image/608016084

LAE5. Pasadena women to honor Dr. Montessori. (1915, May 4). 2. https://www.newspapers.com/image/608009381

Los Angeles Herald (LAH)

LAH1. Americans are given praise by educator. (1915, April 30). 1. https://cdnc.ucr.edu/?a=d&d=LAH19150430.2.162

LAH2. Child educator to be greeted by all L.A. (1915, April 27). 20. https://cdnc.ucr.edu/?a=d&d=LAH19150427.2.453

LAH3. Dr. Montessori to open class here. (1915, May 25). 13. https://cdnc.ucr.edu/?a=d&d=LAH19150525.2.460

LAH4. Dr. Montessori to speak at U. of S.C. (1915, May 20). 1. https://cdnc.ucr.edu/?a=d&d=LAH19150520.2.314

LAH5. Mme. Montessori invited. (1915 March 4). 1. https://cdnc.ucr.edu/?a=d&d=LAH19150304.2.232

LAH6. Mme. Montessori to teach in Calif. (1915, April 20). 7. https://cdnc.ucr.edu/?a=d&d=LAH19150420.2.77

LAH7. Montessori ends her work in L.A. (1915, June 24). 5. https://cdnc.ucr.edu/?a=d&d=LAH19150624.2.341

LAH8. Montessori holds first class here. (1915, May 10). 1. https://cdnc.ucr.edu/?a=d&d=LAH19150510.2.224

Los Angeles Record (LAR)

LAR1. Educator to San Diego. (1915, March 23). 8. https://www.newspapers.com/image/678145164

LAR2. Montessori, educator, is due tomorrow. (1915, April 27). 1. https://www.newspapers.com/image/678145703

Los Angeles Times (LAT)

LAT1. The city and environs: Events briefly told; new college society. (1915, May 21). I–10. https://www.proquest.com/docview/160235612

LAT2. Dr. Montessori coming: Noted educator to hold her third international training school in this city in

May. (1915a, March 9). I–10. https://www.proquest.com/docview/160150196

LAT3. Dr. Montessori coming. (1915b, March 14). I–12. https://www.newspapers.com/image/380296841

LAT4. Expected today. (1915, April 28). II–8. https://www.newspapers.com/image/380595861

LAT5. Girls may rue war husbands; heroes in trenches may not be fireside dears; day to come, says Britisher, when women repent; Pasadena visitor said last good-by to father. (1915, May 10). II–6. https://www.newspapers.com/image/380511173

LAT6. Montessori lectures. (1915, May 25). II–1. https://www.proquest.com/docview/160180902

LAT7. Noted educator at U.S.C.: Mme. Montessori will address Scholarship Society and persons prominent in school circles. (1915, May 21). II–3. https://www.proquest.com/docview/160198409

LAT8. Teaching plans of Montessori; goes to San Diego to talk over arrangements at the fair. (1915, May 3). II–6. https://www.proquest.com/docview/160166572

LAT9. Women's work, women's clubs. (1915, May 14). II–6. https://www.newspapers.com/image/380512529

New York Times (NYT)

NYT1. Carnival days make Rome gay. (1914, February 22). C2. https://www.proquest.com/hnpnewyorktimes/docview/97575856

NYT2. Dr. Maria Montessori at exposition. (1915, July 22). 18. https://www.proquest.com/docview/97736222

NYT3. Mme. Montessori at Exposition. (1914, August 3). 8. https://www.proquest.com/hnpnewyorktimes/docview/97537224

New York Tribune (NYTrib)

NYTrib1. Dr. Montessori arrives: Italian educator to demonstrate methods on coast. (1915, April 20). 14. https://chroniclingamerica.loc.gov/lccn/sn83030214/1915-04-20/ed-1/seq-14

NYTrib2. Spain recalls Montessori: Has $75,000 offer to install system, she sends word. (1915, December 18). 5. https://www.newspapers.com/image/468971551

Oregon Daily Journal (ODJ)

ODJ1. Dr. Montessori is not to come here. (1915, December 1). 9. https://www.newspapers.com/image/78374929

ODJ2. Famous educator will soon come to this coast: Effort being made to secure Dr. Montessori for Portland. (1915, April 25). 7. https://www.newspapers.com/image/78480363

Sacramento Star (SS)

SS1. Montessori grieved. (1915, December 6). 3. https://www.newspapers.com/image/607481806

Sacramento Union (SU)

SU1. Educators gather at Bay for international session. (1915, August 15). 8. https://cdnc.ucr.edu/?a=d&d=SDU19150815.2.84

San Diego Evening Tribune (SDET)

SDET1. City schools are praised. (1915, May 4). 1.

SDET2. Dr. Montessori gives lecture. (1915, July 2). 10.

SDET3. Dr. Montessori will lecture for adults. (1915, July 3). 8.

SDET4. Invitation accepted by Madame Montessori. (1915, March 22). 6.

SDET5. Italian woman speaks Monday. (1915, July 9). 9.

SDET6. Mme. Montessori here to consider school. (1915, May 3). 6, 7.

SDET7. Montessori class at normal ends. (1915, August 11). 8.

SDET8. Montessori to teach 25 San Diego children. (1915, June 26). 4.

SDET9. Summer school to open Monday. (1915, June 30). 10.

SDET10. Tomorrow at the exposition; education day. (1915, July 10). 9.

San Diego Union (SDU)

SDU1. Dr. Montessori heard by 400 pupils, tutors. (1915, July 20). 9.

SDU2. Dr. Montessori speaks at fair; keep child's mind free, hearers told. (1915, July 13). 1, 4.

SDU3. Gleaned on prado and isthmus. (1915, May 2). 10.

SDU4. Lecture course register open. (1915, July 6). 5.

SDU5. Montessori class planned, $1000 voted for building; founder of system sees fair. (1915, May 3). 1, 3.

SDU6. Montessori method to be shown at fair. (1916, June 3). 5. https://cdnc.ucr.edu/?a=d&d=SDDU19160603.2.80

SDU7. Normalites hear Italian educator. (1915, July 2). 6.

San Francisco Call and Post (SFCP)

SFCP1. Chinese girl, protegee of Mrs. Gould, to teach Montessori in Orient. (1915, August 28). 4. https://cdnc.ucr.edu/?a=d&d=SFC19150828.2.105

SFCP2. Dr. Montessori women's guest at Jewel City. (1915, April 26). 8. https://cdnc.ucr.edu/?a=d&d=SFC19150426.2.90

SFCP3. Mme. Montessori to be fair guest. (1915, April 24). 11. https://cdnc.ucr.edu/?a=d&d=SFC19150424.2.174

SFCP4. Montessori child education method is opened at exposition today; kiddies trained at fair under new system. (1915, August 2). 1. https://cdnc.ucr.edu/?a=d&d=SFC19150802.2.103

SFCP5. Mrs. Gould and her sister, Mrs. Wong, to teach in China; rail magnate's wife to introduce Montessori system in the Orient. (1915, November 1). 3. https://cdnc.ucr.edu/?a=d&d=SFC19151101.2.31

SFCP6. Mrs. Gould sails tomorrow to begin life work in China; sisters, long separated, now plan to devote years to Oriental race. (1915, November 5). 5. https://cdnc.ucr.edu/?a=d&d=SFC19151105.2.55

San Francisco Chronicle (SFC)

SFC1. Dr. Montessori will give twelve lectures: Going to Wisconsin after her work at exposition. (1915, October 19). 5. https://www.proquest.com/docview/576515480

SFC2. Education by suggestion will be aim of Montessori class at fair: Individuality of the child will be developed by famous teacher. (1915, August 5). 11. https://www.proquest.com/docview/574390245

SFC3. First Montessori lecture. (1915, August 6). 5. https://www.proquest.com/docview/574389001

SFC4. Four Montessori schools to start. (1915, May 1). 1. https://www.proquest.com/docview/574338139

SFC5. Great educator here for visit. (1915, April 26). 4. https://www.proquest.com/docview/576476922

SFC6. Mme. Montessori to arrive here today. (1915, April 25). 33. https://www.proquest.com/docview/366160776

SFC7. Montessori classes to open at exposition. (1915, July 30). 11. https://www.proquest.com/docview/574353624

San Francisco Examiner (SFE)

SFE1. Dr. Montessori due here on Sunday next. (1915, July 30). 9. https://www.proquest.com/docview/2132790517

Stevens Point Journal (SPJ)

SPJ1. Dr. Montessori accepts Stevens Point invitation. (1915, October 9). 1. https://www.newspapers.com/image/250412314

SPJ2. Dr. Montessori will teach in Stevens Point? (1915, October 6). 1. https://www.newspapers.com/image/250412055

SPJ3. Going to California: Miss Helen Parkhurst of normal to assist Dr. Montessori. (1915, May 26). 1. https://www.newspapers.com/image/250573464

SPJ4. Madam Montessori returning to Italy: Announcement of the cancelling of Madam Montessori's engagement made by local bureau. (1915, December 8). 1. https://www.newspapers.com/image/250416241

SPJ5. Montessori to teach: Famous woman educator will give course at normal. (1915, October 28). 2. https://www.newspapers.com/image/250413686

The Sun (NYSun)

NYSun1. Dr. Maria Montessori here: Teacher of "sense system" to instruct in California. (1915, April 20). 3. https://chroniclingamerica.loc.gov/lccn/sn83030272/1915-04-20/ed-1/seq-3

Washington Evening Star (WES)

WES1. Go to greet Dr. Montessori: Capital educators will welcome teacher back to United States. (1915, April 20). 20. https://chroniclingamerica.loc.gov/lccn/sn83045462/1915-04-20/ed-1/seq-20

WES2. To lecture at G.W.U.: Montessori method to be topic of Dr. Harriet E. Hunt. (1915, February 9). 7. https://chroniclingamerica.loc.gov/lccn/sn83045462/1915-02-09/ed-1/seq-7

Whittier News (WN)

WN1. Attend address. (1915, May 21). 3. https://www.newspapers.com/image/684728148

WN2. Dr. Montessori explains her system: Mind development for child is keynote; local people in audience. (1915, May 22). 1. https://www.newspapers.com/image/683610941

Appendix A
List of Children in PCE Demonstration Class, San Diego

	Name	Parent Name		Name	Parent Name
1	Sylvia Allerback [a]	Fred Allerback	21	Arthur Kelly [a]	John L. Kelly
2	John Barter [b]	–	22	Dorothy Ash Lindsay [a, b]	–
3	Marjory Barter [b]	–	23	Clayton Mosher [a]	G. W. Mosher
4	Annette Clewett [a, b]	George E. Clewett	24	Norman O'Farrell [a, b]	Fred O'Farrell
5	Richard Clewett [a, b]	George E. Clewett	25	Harold Obercotter [a, b]	L. M. Obercotter
6	Robert Clewett [a, b]	George E. Clewett	26	Clara Packard [a, b]	Walter Packard
7	Charles H. Clower [a]	Dan E. Clower	27	Martha D. Reynolds [a, b]	Alexander Reynolds, Jr.
8	Ida Virginia Clower [a, b]	Dan E. Clower	28	Robert Perring Ridout [b]	–
9	Harriet Sefton Crouse [a, b]	Lena Crouse	29	Richard L. Sinclair [a, b]	B. W. Sinclair
10	John Nydegger Degelman [b]	–	30	Ethelyn Stanton [a]	Leon I. Stanton
11	Laura Ferris Degelman [b]	–	31	Evadne Teggart [a, b]	Frank Teggart
12	Marie Eastin [a]	John Eastin	32	Justin Thomas [b]	–
13	Amelia Fiola [a]	Tom Fiola	33	Dorothy Titus [b]	–
14	Lillian Gould [a, b]	Arthur Gould	34	William Van Horne [a]	F. W. Van Horne
15	Barbara Gray [a, b]	Gordon Gray	35	Edwin Arden Watkins [a]	Mrs. E. P. Watkins
16	May Juliet Grube [a, b]	Rev. Howard Grube	36	Amy Fredericka Webb [a, b]	Frederick Webb
17	Angelyn Courtney Hay [a, b]	Arthur Hay	37	Howard Kermit Williams [a, b]	Mrs. H. C. Williams
18	Warren Hershner [a, b]	–	38	Ione Beatrice Wright [a]	W. D. Wright
19	David Clark Hipolito [b]	–	39	Marie Young [a]	Emmett Young
20	Ward Clayton James [a, b]	Lloyd O. James			

Note. As is evident from this list, there are discrepancies among sources as to who attended the demonstration class. For instance, of the 39 children, 20 of them are listed in both sources, 11 are unique to SDET8, and 8 are unique to SDET7. Another source indicates that "there will be about forty little pupils," which seems to confirm the above list of 39 children (SDET9). Children in the demonstration class ranged in age from three to six and were taught by Anna Fedeli, Helen Parkhurst, Helen Little, and Edith Little. The demonstration class was conducted on Tuesdays and Thursdays at 3:30 p.m. The model school was conducted in the art studio of the San Diego State Normal School, not on the Exposition grounds as was initially planned (Robinson, 1915).
[a] SDET8.
[b] SDET7.

Appendix B

List of Children in PPIE Demonstration Class, San Francisco

	Name	Address	City
1	William Mitchell Baxter	1713 Green St.	San Francisco
2	Alice Bernee	–	–
3	Bruce Worster Brown	–	–
4	Robert Summer Brookings	–	–
5	Chester Buchanan	2717 Berkeley St.	Berkeley
6	Percy Cotton	946 Noe St.	San Francisco
7	Marinda Cummings	556 Sixteenth Ave.	San Francisco
8	John S. Drum, Jr.	2114 Broadway	San Francisco
9	Alice Ellinwood	2523 Filbert St.	San Francisco
10	John Corbett Gill	2555 Larkin St.	San Francisco
11	Jean Baird Hartzell	3021 Fulton St.	Berkeley
12	Mortimer Kuhn	–	–
13	Margaretha McCracken [1]	–	–
14	Arthur McEwen	–	–
15	C. Elizabeth McWood	–	–
16	Kathleen [MacLemore] [2]	2843 Green St.	San Francisco
17	Joseph Marks	3326 Washington St.	San Francisco
18	Matthew Marsh	1501 Leavenworth St.	San Francisco
19	Emil Morris, Jr.	2872 Clay St.	San Francisco
20	Catherine Musante	1270 Jackson St.	San Francisco
21	Marcella Oberti	1511 Mason St.	San Francisco
22	Mercedes Quinonez	Stanford Ct. Apartments	San Francisco
23	Helen Storer	–	–
24	Franklin Thomas	6117 Racine St. [3]	Oakland
25	Welbourne Thomas	617 Racine St. [3]	Oakland
26	Margaret Pershing	Post of Presidio #20 [4]	San Francisco
27	Claudine Cotton Warren	2098 Vallejo St.	San Francisco
28	Charles Albert Warren	–	–
29	Ralph Waldo Wellerstein	430 Point Lobos Ave.	San Francisco
30	Robert T. Whitcomb	Massachusetts Bldg.	San Francisco

Note. This information is sourced from the following: Buckenmeyer, 2018, pp. 254–255; Crocker-Langley San Francisco Directory, 1915, 1916; SFC2; ITA10.

[1] Margaretha McCracken is listed in Buckenmeyer (2018) as "Maryaretha McCracker," but a review of the original source confirms the correct spelling (see ITA10).

[2] Buckenmeyer (2018) identifies this name as "Kathleen Mechemore," however, upon inspection of Buckenmeyer's source for this information it appears that the last name actually reads "MacLemore."

[3] The address included in the original source material, and subsequently in Buckenmeyer (2018), inconsistently identify the street numbers for the Thomas siblings, but it is unclear which is accurate.

[4] Margaret Pershing's address was misspelled in Buckenmeyer (2018) and should read, "Post of Presidio #20."

Appendix C
List of Participants in the First California Training Course (Pasadena, Los Angeles, and PCE in San Diego)

	Name	Residence
1	Miss Edna Christine Abbott	268 Sterling Place, Brooklyn, N. Y.
2	Mrs. Alfa Wood Anderson	Glendora, Cal.
3	Mrs. Emma Ashburn	303 West E. St., Ontario, Cal.
4	Mrs. Katharine Bates	El Cajon, R.F.D., Cal.
5	Miss Anita Rose Blun	The Wellsmore, 77th St. and Broadway, New York City
6	Mrs. Prudence Stokes Brown	Llano, Cal. c/o Del Rio Co-operative Community
7	Mrs. Ruby H. Bruning	5032 St. Lawrence Ave., Chicago, Ill.
8	Mrs. J. P. Burlingham	206 ½ Comstock Ave, Syracuse, N. Y.
9	Miss M. Pamelia Clough	2427 Prospect St., Berkeley, Cal.
10	Mrs. Augustus (May) Davis	693 S. Euclid Ave., [Pasadena], Cal.
11	Mrs. Hope Gardiner Dillingham	1106 Lake Shore Drive, Chicago, Ill.
12	Miss Jeanie Joel Dillon	950 Clark St., Stevens Point, Wis. Perm. add., Alvarado Hotel, Los Angeles, Cal.
13	Miss Pauline H. Field	Hollywood, Cal.
14	Miss Roberta L. Fletcher	1525 35th St., N. W., Washington, D. C. Perm. Victorville, Cal.
15	Miss Marie A. F—tz	909 Harrison St., Syracuse, N. Y.
16	Miss Enid Frank	345 West 88th St., New York City
17	Mrs. S. H. Friend	406 Irving Place, Milwaukee, Wis.
18	Miss Ellen B. Frink	907 Hilyard St., Eugene, Ore.
19	Miss Mary Louise Gilman	405 West D. St., Ontario, Cal. Perm. add., Covina, Los Angeles, Cal.
20	Miss Elizabeth L. Glass	683 Shepard Ave, Milwaukee, Wis.
21	Mrs. Florence P. Griffith	10 Aurora Drive, Riverside, Cal.
22	Mrs. Lillian Parks Gunnell	381 Lincoln Ave., Palo Alto, Cal.
23	Miss Cecelia Hardman	1317 12th St., Santa Monica, Cal. Perm. add., 2826 10th St., Seattle, Wash.
24	Mrs. Hazel Clark Hipolito	2345 Ocean View Ave., Los Angeles, Cal.
25	Miss Mary T. G. Hodenpyl	Cooperstown, N. J., c/o Susan Fenimore Cooper Foundation. Perm. add., 123 Hobart Ave, Summit, N. J.
26	Mr. Prince Hopkins ‡	Santa Barbara, Cal.
27	Mrs. Agnes C. Houghton	26 Hancock St., Lexington, Mass.
28	Miss Mildred Johnston	Alameda and Santa Rosa Sts., Altadena, Cal. Perm. add., P. O. Box 404, Chicago, Ill.
29	Dr. Mary [Powell] Jordan	230 Colina Ave, Los Angeles, Cal.
30	Miss Helen Klock	406 Irving Place, Milwaukee, Wis. Perm. add., Derry Village, N. H.
31	Mrs. J. W. Lawrence	925 Flink Ave., Venice, Cal.

	Name	Residence
32	Miss Lois Lindsay	1256 Western Ave., Topeka, Kan.
33	Miss Edith R. Little	1225 Hinman Ave., Evanston, Ill.
34	Miss Helen M. Little [†]	1225 Hinman Ave., Evanston, Ill.
35	Miss Helen McCall	1506 Harmon Place, Minneapolis, Minn. Perm. add., 910 2nd St., Santa Monica, Cal.
36	Miss May T. McGuinness	131 Benevolent St., Providence, R. I.
37	Miss Lucy Mead	555 Chestnut St., San Francisco, Cal.
38	Miss Katherine Moore	2003 So. Grand Ave., Los Angeles, Cal.
39	Miss Ruth Pendleton Morrison	1506 Harmon Place, Minneapolis, Minn.
40	Mrs. Mary L. Newland	281 Addison Ave., Palo Alto, Cal.
41	Mrs. Hazel G. Owen	718 So. Los Robles, Pasadena, Cal.
42	Miss Helen Parkhurst [a]	56 West 75th St., New York City
43	Miss Dorothy Peck	1350 Bryant St., Palo Alto, Cal.
44	Miss Margaret E. Perkins	1525 35th St., N. W., Washington, D. C. Perm. add., Windsor, Vermont
45	Miss Louise Person	Alameda St., Altadena, Cal. Perm. add., 4601 E. Colorado St., Pasadena, Cal.
46	Miss Adelia McAlpin Pyle [a]	Calle Duputacio, 262, Pral., Barcelona, Spain. Perm. add., 11 E. 68th St., New York City
47	Miss Dorothy Sears	Kenilworth, Ill.
48	Mrs. Belle F. Stein [†]	56 W. 75th St., New York City
49	Miss Mildred Tarrant	Grand Rapids, Wis. Perm. add., Durand, Wis.
50	Mrs. Beulah Townsend	2347 Ocean View Ave., Los Angeles, Cal.
51	Mr. James Townsend	712 San Fernando Bldg., Los Angeles, Cal.
52	Miss Adele Von Berlo	195 Harrison St., Brooklyn, N. Y.
53	Miss Blanch Weill	555 Chestnut St., San Francisco, Cal. Perm. add., 1627 17th St., [Bakersfield], Cal.
54	Miss Irma Weill	555 Chestnut St., San Francisco, Cal. Perm. add., 1627 17th St., [Bakersfield], Cal.
55	Miss Elizabeth Whitcomb	Glendora, Los Angeles County, Cal.
56	Miss Agnes Wiley	612 Kensington Road, Los Angeles, Cal.
57	Miss Bertha A. Wiley	1324 ½ S. New Hampshire Ave., Los Angeles, Cal.
58	Mr. J. Stitt Wilson	Ridge Road, Berkeley, Cal.
59	Mrs. J. Stitt Wilson [Emma Agnew Wilson]	Ridge Road, Berkeley, Cal.
60	Miss Violette Wilson	Ridge Road, Berkeley, Cal.

Note. This data is sourced from National Montessori Promotion Fund (1916).

[†] Attended only part of the course.

[‡] Attended part time but does not hold certificates.

[a] Attended both 1915 California training courses.

Appendix D
List of Participants in the Second California Training Course (PPIE, San Francisco)

	Name	Residence
1	Miss Ruth Cooper Fisch ‡	——
2	Mrs. Eugene Andriano	1461 Vallejo St., San Francisco, Cal.
3	Miss Lydia Atterbury †	3620 LeConte Ave., Berkeley, Cal.
4	Miss Marion Baldwin	1440 Clay St., San Francisco, Cal.
5	Miss Ella A. Barrett ‡	3109 Sacramento St., Los Angeles, Cal.
6	Mrs. Florence Bassity	Peking, China
7	Mrs. Marion Ebon Beaufait	c/o Castelleja School, Palo Alto, Cal. Perm. add., 1408 Scenic Way, Berkeley, Cal.
8	Mrs. F. A. Berne	2197 Divisadero St., San Francisco, Cal. Perm. add., South Tacoma, Wash.
9	Miss Dorothy Chapel	661 Mansfield Place, Brooklyn, N. Y.
10	Miss Lillian Mark Crawford	1521 28th St., N. W., Washington, D. C. Perm. add., 432 S. Prospect St., Hagerstown, Mass.
11	Miss Julia Farney	c/o John Muir School, Berkeley, Cal. Perm. add., San Jose, Box 87, Cal.
12	Mrs. C. H. Farrington	483 E. 25th St., Portland, Ore.
13	Miss Catherine L. Flanner	1350 Bryant St., Palo Alto, Cal. Perm. add., Chicago, Ill.
14	Mr. William Gerkee	Room 324, 417 Montgomery St., San Francisco, Cal.
15	Mrs. Harriett Germaine	501 Greenwood Ave., Blue Island, Ill.
16	Mrs. Jean E. Gilbert	110 Cooper Ave., Upper Montclair, N. J.
17	Miss Helen E. Goodell	Loda, Ill.
18	Mrs. Grace J. Greenhill	1023 Jefferson St., Waco, Texas
19	Miss Emily H. Greenman	353 West 117th St., New York City
20	Miss Eleanor Hay	LaGrange, Mo., c/o Dr. J. T. Muir. Perm add., Urbana, Ill.
21	Mrs. Florence Hoffman	553 Oakland Ave, Oakland, Cal.
22	Miss Nina Hurlbut	Tulalip, Wash.
23	Miss Louise Klein	Blackmer Home, 50 Takota, Oi Matsu Cho, Koishikawa, [Tokyo], Japan. Perm. add., 321 E. Second St., Plainfield, N. J.
24	Miss Ellen Wheeler Knight	Fordyce, Ark.
25	Miss Ah Ying Low	53 Pen Tzu Hutung, Peking, China
26	Miss Margaret Murphy	116 Lake St., Oakland, Cal. Perm. add., 108 Peck St., Negaunne, Mich.
27	Miss Helen Parkhurst [a]	56 West 75th St., New York City
28	Miss Adelia McAlpin Pyle [a]	Calle Duputacio, 262, Pral., Barcelona, Spain. Perm. add., 11 E. 68th St., New York City
29	Mrs. Sarah Scroggs	1806 Addison St., Berkeley, Cal.
30	Miss Mary Spiers	Calistoga, Cal.

	Name	Residence
31	Mrs. Esther Taylor	2116 San Jose St., Alameda, Cal.
32	Miss Rose Trumpler	1629 McAllister St., San Francisco, Cal.
33	Miss Dorothy Dart Watrous	406 Hawthorne St., San Diego, Cal.
34	Miss Mary Alice Woitishik	1402 B Ave., Cedar Rapids, Iowa
35	Mrs. Sun Yue Wong	53 Pen Tzu Hutung, Peking, China

Note. This data is sourced from National Montessori Promotion Fund (1916).

[†] Attended only part of the course.

[‡] Attended part time but does not hold certificates.

[a] Attended both 1915 California training courses.

Montessori Elder and Dementia Care, and Trauma-Informed Approaches: A Thematic Analysis Examining Connections Between the Models

Bernadette Phillips, Maynooth University, Ireland

Abstract: According to the World Health Organization, there are currently more than 55 million people living with dementia worldwide, and this figure is expected to triple by 2050. Recent studies suggest that there may be a link between childhood trauma (which refers to exposure to overwhelmingly stressful experiences before the age of 18 years) and the onset of dementia in later life. Therefore, in communities caring for persons living with dementia, some residents may have been exposed to trauma in childhood. Currently, there is an increasing awareness of the negative impact of childhood trauma on later adult health and well-being, and a corresponding recognition of the need for services, including for dementia care, to be trauma-informed. In the last decade, the Montessori Method has become established as a legitimate approach to elder/dementia care. However, it has not yet been examined as a trauma-informed approach. The aim of this paper is to address that gap by (a) highlighting how Maria Montessori took steps to integrate interdisciplinary knowledge of trauma into her Method when she began to understand the potential of childhood trauma to adversely impact adult health and well-being, and (b) outlining how the Montessori Method, when applied to dementia care, incorporates many of the core principles of trauma-informed practice. This paper concludes that the Montessori Method for dementia care has the built-in capacity to be trauma-sensitive and trauma-responsive, but that its ongoing rollout should follow Montessori's lead by specifically integrating knowledge about the neurobiology of trauma into its training programs.

According to the Centers for Disease Control and Prevention, "Dementia is not a specific disease but is rather a general term for the impaired ability to remember, think, or make decisions, that interferes with doing everyday activities" (Centers for Disease Control and Prevention, 2023). Dementia results from a variety of injuries and diseases that affect the brain, including vascular diseases and strokes. The most common form of dementia, accounting for 60-80% of cases, is Alzheimer's disease (Alzheimer's Association, 2023). Although dementia is not a normal part of aging, the prevalence of dementia is increasing year on year (World Health Organization, 2023). This prevalence is occurring for a number of reasons, including increased longevity. Global dementia cases are forecasted to triple by 2050 (GBD 2019 Dementia Forecasting Collaborators, 2022).

Recent studies (Corney et al., 2022; Couzner et al., 2022; Radford et al., 2017; Schickedanz et al., 2022; Tani et al., 2020) suggest that a link exists between exposure to adversity or trauma in childhood and the onset of dementia in later life. *Childhood adversity* includes such stressors as exposure to neglect, abuse, domestic violence, parental substance misuse, parental mental health problems, and parental divorce (Felitti et al., 1998). These types of experiences overlap with what is considered *childhood trauma,* which refers to exposure to stressful experiences that overwhelm children and adolescents under the age of 18 in the absence of a supportive adult (Substance Abuse and Mental Health Services Administration, 2014). The groundbreaking Adverse Childhood Experiences (ACE) Study (Felitti et al., 1998) found that adverse experiences in childhood are common and are found in all socioeconomic groups. Therefore, in communities caring for elders and persons living with dementia, it is likely that some of the residents may have been exposed to adversity or trauma in childhood. Building on the findings of the ACE study, an increasing body of literature highlights the negative impact of childhood trauma on later adult health and well-being (Bellis et al., 2019; Burke Harris, 2019; Shonkoff et al., 2012; van der Kolk, 2014). Chandrasekar and colleagues found that exposure to adversity in childhood predisposes an individual to multimorbidity, i.e., living with two or more chronic conditions such as cardiovascular disease, diabetes, or mental illnesses such as anxiety or depression (Chandrasekar et al., 2023). Their findings showed that "Childhood adversity was associated with a progressively increasing burden of multimorbidity across adulthood into early old age" (p. 2). Accompanying these findings is a corresponding recognition by professionals working with adversity-experienced individuals of the need for human services—including services for dementia care—to be ACE-aware and trauma-informed. Being trauma-informed means being aware of the potentially negative impact of exposure to adversity and trauma on individuals (Cations et al., 2020, 2021; Couzner et al., 2022).

This recognition of the need to make dementia care become trauma-informed has an important bearing on the relatively recent use of the Montessori Method in the care of people living with dementia. Given the possible link between early exposure to trauma and the onset of dementia in later life, it is important that Montessori practitioners for dementia programs are aware of how childhood trauma can impact the progression of dementia and how a trauma-informed approach can result in better care practices. This paper highlights how Montessori understood the potential of unaddressed childhood trauma to adversely impact later adult health and well-being, and in response took steps to integrate interdisciplinary knowledge on trauma into her Method (Montessori, 2013a/1917). It also outlines how the Montessori Method, when applied to dementia care, incorporates (perhaps unconsciously) many of the core principles of trauma-informed practice. This paper concludes that the Montessori Method for dementia care has the in-built capacity to be trauma-sensitive and trauma-responsive, but that its ongoing rollout should follow Montessori's lead by specifically integrating knowledge about trauma and trauma-informed practice into its training programs.

Method

This paper examines connections between the Montessori Method for elder and dementia care, and trauma-informed approaches. To conduct this study, Braun and Clarke's (2022) analytical approach to thematic analysis was used. This approach involved six steps. The first step was to become familiarized with the data in the literature listed in Table 1, and to take note of any recurring features and initial thoughts on how to code the data. The second step involved extracting pieces of text and highlighting them with different colors to create initial codes or meaningful labels that could identify recurring ideas in the data set. For example, when reading Montessori's pamphlet about the World War I French and Belgian refugee children (Data Group F), I extracted several pieces of text from which I created the initial codes "war," "trauma," "physical wounds," "psychological wounds," and "human degeneration."

Table 1

List of Resources

Resources on Montessori Methods for dementia			
Author	*Date*	*Title of Document*	*Document*
Camp, C. J.	1999	Montessori-based activities for persons with dementia. Vol. 1	Book
Camp, C. J. et al.	2006	Montessori-based activities for persons with dementia. Vol 2	Book
Camp, C. J.	2012	Hiding the stranger in the mirror: A detective's manual for solving problems associated with Alzheimer's disease and related disorders.	Book
Brenner, T. & Brenner, K.	2020	The Montessori Method for connecting to people with dementia: A creative guide to communication and engagement in dementia care.	Book
Brush, J.	2020	Montessori for elder and dementia care.	Book
Resources on the possibility of a link between childhood trauma and dementia			
Radford et al.	2017	Childhood stress and adversity is associated with late-life dementia in Aboriginal Australians.	Article
Tani et al.	2020	Association between adverse childhood experiences and dementia in older Japanese adults.	Article
Schickedanz et al.	2022	The association between adverse childhood experiences and positive dementia screen in American older adults.	Article
Corney et al.	2022	The relationship between adverse childhood experiences and Alzheimer's disease: A systematic review.	Article
Resources on the need for trauma-informed aged care			
Cations et al.	2020	Trauma-informed care in geriatric inpatient units to improve staff skills and reduce patient distress: a co-deigned study protocol.	Article
Cations et al.	2021	The case for trauma-informed age care.	Article
Couzner et al.	2022	Delivering trauma-informed care in a hospital ward for older adults with dementia: An illustrative case series	Article
Resources on trauma-informed principles			
Fallot, R. & Harris, M.	2009	Creating cultures of trauma-informed care: A self-assessment and planning protocol.	Article
SAMSHA	2014	SAMSHA's concept of trauma and guidance for a trauma-informed approach.	Report
Resources on adverse childhood experiences and trauma			
Felitti et al.	1998	Relationship of childhood abuse and household dysfunction to many of the leading causes of death in adults: The Adverse Childhood Experiences (ACE) Study.	Report
Perry, B. D.	1999	Memories of fear: How the brain stores and retrieves traumatic experience.	Book chapter
Resources on Montessori's involvement with trauma-affected children			
Montessori, M.	2013/1917	The white cross	Pamphlet

Table 2

Stages in the Thematic Analysis

Data Group Literature topics	Initial Codes	Emerging Themes
A: Montessori Methods for dementia	Camp's Insight – links between the Montessori Method and interventions for persons with dementia.	The perfect fit: applying the Montessori Method to dementia care
B: Possible links between childhood trauma and dementia	The compelling facts and figures; the limitations in the studies.	Is there a link between adversity in childhood and the onset of dementia in adulthood?
C: The need for trauma-informed aged care	Past history of neglect or abuse, personal care issues.	There is a real need for aged-care staff to be trauma-informed to prevent re-traumatization.
D: Trauma-informed principles	The need for safety, trust, peer support, collaboration, choice, empowerment.	Is the Montessori Method for dementia a trauma-informed approach?
E: Adverse childhood experiences and trauma	Neglect, abuse, caregiver mental instability; household substance abuse; domestic violence; incarceration of family member; death of caregiver; separation from caregiver.	The impact of childhood adversity on later physical and mental health.
F: Montessori's involvement with trauma-affected children	War/trauma/physical wounds/psychological wounds.	Montessori's involvement with trauma-affected children.
		Montessori's concerns for trauma-affected children's exposure to criminality.
		Montessori's concerns for trauma-affected children's mental and physical health.
		Montessori's concerns for trauma-affected children's later adult health.
G: Montessori's core principles	Human need for work (meaningful activity, independence, respect, self-worth, contribution, intergenerational living, belonging, sense of community.	How the Montessori Method when applied to aged and dementia care can promote these core principles.

These initial codes and references to the data sources that support them are listed in Table 2. The third step involved identifying potential or emerging themes. In this respect, I took a deductive approach in that my choice of themes was influenced by my existing knowledge. This step also involved grouping some of my codes into broader themes. For example, from the initial codes, I created the following emerging themes: Montessori's involvement with trauma-affected children; Montessori's concerns for trauma-affected children's exposure to criminality; Montessori's concerns for trauma-affected children's mental and physical health; Montessori's concerns for trauma-affected children's later adult health. Emerging themes from the data groups are listed in Table 2. The fourth step involved reviewing the potential themes against the data to establish relevance, usefulness, and that they were distinct enough from other emerging themes to stand alone. The fifth step involved naming the themes such that they would be engaging and of interest to a potential reader. The sixth step involved the write up of the article using the themes as the structure.

Theoretical Framework

This study is based on the pioneering research of Cameron Camp, through which he discovered the potential of the Montessori Method to help persons living with dementia to live meaningful and fulfilling lives despite their particular challenges (Camp, 1999, 2010, 2012; Camp et al., 2006; Camp & Shelton, 2023). It is also anchored on the groundbreaking ACE study (Felitti et al., 1998) and the concept of trauma and trauma-

informed practice as adopted by established authorities on trauma, including the Substance Abuse and Mental Health Services Administration (SAMHSA; 2014). Additionally, this study is centered on Montessori's writings on the dangers of unaddressed childhood trauma to the health and well-being of present and future generations as specifically expressed in the publication she circulated during World War I (Montessori, 2013a/1917).

Results

Three major themes emerged from the analysis (with a number of sub-themes in the third theme). These were: (a) the possible link between ACEs and dementia; (b) Montessori's insights into the risks posed by childhood trauma to later physical and mental health; and (c) The Montessori Method for aged care and people living with dementia.

The Possible Link between ACEs and Dementia

The first theme that emerged from the analysis relates to the possible link between exposure to ACEs and the onset of dementia in late adulthood. The ACE study showed that exposure to ACEs (e.g., neglect, abuse, domestic violence, issues with caregivers such as mental illness, substance misuse, death, divorce, or incarceration) before the age of 18 can lead to the onset of negative conditions in later life (Felitti et al., 1998). These conditions include mental health issues such as anxiety and depression, which can lead to a lifestyle marked by isolation, poor diet, lack of exercise, or the adoption of health risk behaviors. These behaviors include misuse of alcohol or drugs and premature or risky sexual practices, all of which are the lead causes of chronic disease and even early death in adulthood (Felitti et al., 1998). It is worth noting that these factors also negatively impact overall brain health (Tani et al., 2020). The ACE study used a straightforward scoring method which became known as the ACE Score (a measure of reported exposure to 10 different types of adversity in childhood) to determine the extent of each of the study participant's exposure to childhood adversity. The major findings of the ACE study were that ACEs are (a) common, (of the 17,337 predominantly white, educated, middle-class participants surveyed, almost two thirds reported exposure to at least one ACE), (b) interrelated (e.g., exposure to caregiver substance abuse often also involves exposure to physical abuse), and (c) a common pathway toward negative behaviors, which

can lead to disease, disability, social problems, and even premature death. While the ACE study's groundbreaking research explained the link between ACEs and many common illnesses (including heart disease, cancer, diabetes, asthma, anxiety, and depression), it did not refer specifically to the possibility of a link between ACEs and the onset of dementia in late adulthood. However, it is arguable (although Felitti et al. did not specifically state this) that habits such as smoking, high alcohol consumption, poor diet, lack of physical activity, low levels of cognitive stimulation—all of which have been found to be risk factors for the onset of dementia—may, in some cases, have their origins in early life exposure to adversity or trauma.

To date, few studies have focused on the possible link between exposure to ACEs in childhood and the onset of dementia in later years. However, studies on this topic are beginning to emerge. In 2017, the work of Radford and colleagues provided compelling evidence that childhood stress and adversity are associated with late-life dementia in aboriginal Australians (Radford et al., 2017). The obvious limitation of the study was that it only included data relating to a relatively rural population of Aboriginal elders. In 2020, Tani and colleagues conducted a research project that they claimed was the first study to examine the association between adverse childhood experiences and dementia incidents using a large-scale cohort study of "older Japanese people" (Tani et al., 2020, p. 8). The findings of their large-scale study (17,412 persons) revealed that "having three or more adverse childhood experiences was associated with increased dementia risk among older Japanese adults" (p. 1). The association was weaker after adjusting for social relationships. This suggests that social connection may be a factor that can influence the link between adverse experiences in childhood and the onset of dementia in later life. The findings in this study are important because they suggest that preventing or reducing ACEs in the first place or helping the victims of these experiences to heal may provide a pathway toward preventing or delaying the onset of dementia in later life. However, the study had limitations in that it used retrospective surveys, which are vulnerable to recall bias, and the findings may not be generalizable to other cultures.

More recently, Schickedanz and colleagues (2022) claimed that their study is the first to examine the association between ACE scores and "a positive dementia screen" among a national sample of older adults in the United States (p. 2399). They found that a higher number of ACEs was associated with an increased possibility of

screening positively for dementia. They say that their findings were not unexpected given the fact that the ACE study showed the correlation between exposure to adversity and future vulnerability to chronic diseases. They claim that the risk of dementia is affected by "early life stress" as well as sociodemographic and other factors including genetic predisposition (Schickedanz et al., 2022, p. 2401). In an effort to back up this claim, they state that the association between ACEs and the risk for dementia found in their study provides further evidence of the long-lasting and detrimental impact of exposure to adversity and trauma in childhood on early brain development and function. They further claim (referring to Perry & Pollard, 1998) that ACE score-related dementia risk may be an enduring consequence of "adaptive neurodevelopment" (in response to neuroactivation that impacted the formation of certain neural networks) in the formative years, arising directly from exposure to adversity or trauma (Schickedanz et al., 2022, p. 2401). They further point out that ACE scores have been shown to be associated with social isolation and they suggest that there might be "a domino effect" beginning with exposure to childhood adversity, which can lead to attachment problems and difficulties with relationships in adulthood, tending towards an increased risk of "social isolation" and dementia in the later years (Schickedanz et al., 2022, p. 2402). Limitations in the study included the fact that a person's ACE score does not indicate the severity or frequency of the individual's exposure to ACEs, nor does it take into account the age of the person when the exposure occurred. Limitations also include the fact that a person's ACE score does not give information on the presence or absence of resilience factors such as positive relationships with family, friends, or communities. Notwithstanding these limitations, the authors claim that their study is the first U.S. study to actually show the association between ACE scores and dementia risk, and they conclude with the admonition that "childhood adversity and trauma should be considered risk factors for dementia" (Schickedanz et al., 2022, p. 2403) and that a greater exposure to ACEs is associated with a "higher probability" of a positive dementia screen in older adulthood (Schickedanz et al., 2022, p. 2398). Similarly, Corney and colleagues (2022) concluded from their systematic review on the relationship between ACEs and Alzheimer's disease that adverse childhood experiences appear to be associated with "an increased risk of Alzheimer's disease," although they state that further research is needed (p. 1).

The findings from these studies are of importance for all professionals involved in the design of models for elderly and dementia care because if adverse childhood experiences are associated with an increased susceptibility to developing dementia, then it follows that (a) an appropriate evidence-based intervention strategy is needed to identify elders who may not have dementia yet but who are at a high risk of developing it because of exposure to trauma in their childhood, and (b) in communities of people who already have dementia, some are likely to have experienced adversity or trauma in childhood. Therefore, staff working with them will need to be capable of incorporating a trauma-informed lens into their daily caring practices. This will involve understanding the basics of how trauma can impact the mind and the body. It will involve being aware of such things as the workings of the stress response system, the role of adaptive responses, and the problem of trauma triggers. It involves recognizing how triggers (which could take the form of a memory, a color, a smell, a sight or a sound) can have an adverse impact on an individual and learning how to reduce or eliminate them, if possible.

Montessori's Insights into the Risks Posed by Childhood Trauma to Later Physical and Mental Health

The second theme that emerged from the analysis relates to Montessori's insights and concerns in relation to the dangers of unaddressed childhood trauma on later adult health and well-being. Maria Montessori (1870-1952) was one of Italy's first female physicians and a recognized expert in psychiatry (Babini & Lama, 2000; De Stefano, 2022; Gutek & Gutek, 2016; Kramer, 1976; Povell, 2010; Standing, 1957). She had a profound interest in the area of mental health and the study of mental illness (Babini, 2000). In fact, the title of her thesis for her M.D. degree was "Contributo clinico allo studio delle allucinazioni a contenuto antagonistico," or "A clinical contribution to the study of delusions of persecution" (Montessori, 1897), which was published a year after her graduation. The term "antagonistico" referred to what today would be called "paranoid" (Kramer, 1976, p. 48). Over 100 years ago, in a short publication, Montessori expressed her concerns about the long-term effects of childhood trauma on later adult health and well-being (Montessori, 2013a/1917). In this publication, written during the first world war, she stated that trauma-affected children (especially war-torn children) suffer "mental lesions" and "a weakening of the entire nervous system," which poses "a danger to his future life" (Montessori, 2013a/1917, pp. 38-39). Her publication not only anticipated current findings on the

potentially devastating impacts of unaddressed childhood trauma on later adult life (Burke Harris, 2019; Felitti et al., 1998; van der Kolk, 2014), but the vital importance of the timing of the exposure to trauma. Her statement that "the younger the age of the child when this lesion comes, the greater the danger to his future life" (Montessori, 2013a/1917, p. 39) anticipates the findings of several of the world's leading experts in childhood trauma. One such expert, Bruce Perry, states that adverse experiences in early childhood "can alter the organization of developing neural systems in ways that create a lifetime of vulnerability" because "the brain is most plastic (receptive to environmental input) in early childhood" (Perry, 2009, p. 245). Furthermore, Montessori's statement that "when this shock or lesion comes during the prenatal period, it is even more dangerous" (Montessori, 2013a/1917, p. 39), anticipates the findings of leading organizations that deal with child health. For example, a relatively recent publication from the National Scientific Council on the Developing Child (2020) at Harvard University emphasizes the risks posed by pre-natal trauma to life-long health and well-being.

Montessori also recognized that the harm caused to children by exposure to trauma had the capacity to be "passed on to succeeding generations" (Montessori, 2013a, p. 38). In this respect one could argue that she anticipated the relatively new science of epigenetics, (although her understanding of this area of science would necessarily have had to be more intuitive than research-based). Epigenetic changes are modifications to DNA that regulate whether genes are turned on or off. This is interesting in relation to the onset of dementia because, currently, research in the area of epigenetics and dementia suggests that dementia may not be a suddenly occurring disease but rather a gradual change in crucial cellular neural pathways that, through the process of neurodegeneration, change a healthy state into a dysfunctional state. For example, relatively recent research by Maloney and Lahiri (2016) on the epigenetics of dementia explains that as epigenetic changes occur over time in response to our environment, accumulated environmental hits produce latent epigenetic changes in an individual. They claim that "these hits can alter biochemical pathways until a pathological threshold is reached, which appears clinically as the onset of dementia" (p. 1). This theory has relevance for those offering a Montessori approach for aged and dementia care because, as prevention is better than cure, the science of epigenetics may help aged persons who

do not already have dementia to deter its onset. Maloney and Lahiri suggest that evidence from epigenetics "could lead to ways to detect, prevent, and reverse such processes before clinical dementia" is diagnosed (p. 1). Montessori's insight, therefore, into the capacity of childhood trauma to negatively impact the future mental health of individuals and even that of future generations is worthy of note. If we heed her advice to take clear and decisive steps to protect the mental health of children, we may find ourselves on the path towards guarding against dementia in some individuals.

It is also clear from Montessori's pamphlet published during the war years that she believed the "psychic wounds" (Montessori, 2013a, p. 39) from childhood trauma, which include a loss of "mental energy and intelligence" (p. 39), may leave children exposed to "great dangers" (p. 39). Some of these dangers include a vulnerability to adopting behaviors that can lead to children becoming "juvenile criminals" at rates "far greater than at other times" (p. 39). She said that it is "well known" that this vulnerability in the individual is evident after a great disaster (p. 39). It is arguable that she anticipated (albeit in a modest way given that she did not conduct any empirical studies on this issue) what Felitti and colleagues were to discover about the link between exposure to adversity and trauma in childhood, and later-life susceptibility to adopting behaviors that can lead to chronic illness and even early death, as outlined in the groundbreaking ACE study (Felitti et al., 1998).

Montessori's response to the problem of childhood trauma was clear and carefully considered. She urged the bringing together of experts in psychiatry, education, medicine, social work, and other related professions to design an interdisciplinary trauma-informed training course to be delivered to professionals involved in the care of trauma-affected children (Montessori, 2013a). If Montessori were here today, it is likely that she would recommend a similar coming together of experts to design a trauma-informed course for persons involved in the Montessori approach to the care of people living with dementia.

The Montessori Method for Aged Care and People Living with Dementia

The third and final theme that emerged from the analysis relates to the Montessori Method for aged care and people living with dementia. This theme has three sub-themes: (a) the goals of the Montessori approach for aged and dementia care; (b) how the key principles

of trauma-informed practice are embodied in the Montessori Method for aged and dementia care; (c) how the Montessori Method, when applied to dementia care, provides a sense of belonging and the strength of community—which are powerful factors in promoting healing from trauma. Before the exploration of these sub-themes, a brief background to the origins of the Montessori Method as applied to aged and dementia care is necessary.

Almost 30 years ago, Cameron Camp, a psychologist conducting applied research in gerontology and dementia, began to examine the materials, method, and environment, associated with Montessori education (Camp, 2010), and began to see "linkages" between Montessori's approach and the translation of "concepts in neuroscience" into practical interventions for persons living with dementia (Camp, 2010, p. 4). In 1996, Vance, Camp, and colleagues published an article in *Montessori Life* in which the concept of using the Montessori Method as an approach to dementia care was discussed. Camp was struck by the potential of Montessori Methods as interventions to relieve "challenging behaviors" in persons living with dementia (2010, p. 2). In 1999, Camp published the first ever manual outlining Montessori-based activities for persons living with dementia, adding another volume a few years later (Camp et al., 2006). As a direct result of Camp's research, the Montessori Method for aged care and people living with dementia has now become established as a legitimate and helpful approach in which Montessori's philosophies and principles are effectively adapted to the needs of persons living with dementia.

The Goals of the Montessori Approach to Aged Care and People Living with Dementia

The first sub-theme relates to the goals of the Montessori approach to aged and dementia care. The Montessori approach to aged and dementia care has several goals, the most important of which is to improve the quality of life of elders and people living with dementia (Camp & Shelton, 2023). This goal is achieved by creating low-stress prepared environments for this plane of life in which respect for human dignity, independence, and meaningful engagement is promoted and supported. It is also vital that all staff understand that these are factors of paramount importance for the human being's physical, social, emotional, psychological, and spiritual well-being. The approach is based on six core principles that form the essence of Montessori's discoveries about the human being. These core principles in aged and dementia care center on the human need for *work* (engagement in meaningful activities); *independence* (being supported to do as much as one can with remaining abilities); *respect for human dignity* (being treated in ways that acknowledge one's dignity, for example, by being offered choice); *self-esteem* (promoted by helping an individual to accomplish tasks and maintain remaining skills); *contribution* (to the family or community one lives in); and *intergenerational living* (promoted where possible by liaising with local schools to allow the elders to help children with their school work). In practice, the Montessori approach to dementia care focuses on supporting the person behind the dementia by identifying their interests, remaining skills, and abilities, and offering a choice of meaningful activities that help to maintain and, in some cases, even build on these skills (Phillips & Phillips, 2015). This is done (with the resident's permission) in collaboration with the resident and their family or friends who can often help to identify the person's strengths.

How the Montessori Method, When Applied to Aged and Dementia Care, Embodies the Key Principles of Trauma-Informed Practice

The second sub-theme relates to how the Montessori Method embodies the key principles of trauma-informed practice when it is applied to aged and dementia care. The 2014 SAMHSA document states that their concept of a trauma-informed approach is "grounded in a set of four assumptions and six key principles" (Substance Abuse and Mental Health Services Administration, p. 9). The four assumptions—the four Rs—are that a trauma-informed organization *realizes* the widespread impact of trauma; *recognizes* the signs and symptoms of trauma; *responds* by fully integrating knowledge about trauma into policies, procedures, and practices; and actively *resists* re-traumatization of clients. The six key principles listed by SAMHSA are: safety; trustworthiness and transparency; peer support; collaboration and mutuality; empowerment, voice, and choice; cultural, historical, and gender issues. The first five of these principles were identified by Fallot and Harris (2009) in their seminal work on trauma-informed services as being the essential principles of trauma-informed care.

The Four Rs. From the published literature on Montessori Methods for dementia, it is not apparent that the four Rs recommended by SAMHSA for an organization to be trauma-informed are being addressed in the training program manuals for students taking training in Montessori Methods for dementia. However,

since one important aspect of Montessori programs for aged and dementia care is knowing the person, which includes knowing the person's background, previous employment or occupations, interests and hobbies, remaining strengths, and self-regulating habits, it is arguable that the four Rs could be more intentionally incorporated into the Montessori approach to dementia care.

The Six Principles: Safety. The Montessori approach to aiding people living with dementia promotes a sense of physical and psychological safety in an older person by providing a continuous dose of "safety cues" throughout the day in the form of the use of gentle tones of voice, friendly facial expressions, and non-threatening body language. This continuous "trickle" of safety cues can help staff to calm persons (especially new residents) who may feel a sense of fear, resulting in agitated behaviors (Couzner et al., 2022). These safety cues have the effect of calming the amygdala (the fear center in the brain) and dampening the stress response systems (van der Kolk, 2014). People who have been exposed to trauma often see the world as an unsafe place; helping them to feel physically and psychologically safe is a priority (Herman, 1994).

Montessori gave copious instructions and recommendations to her teachers about their self-preparation (Montessori, 1936, 1964/1912, 1967/1949). She wrote, "The teacher should study her own movements, to make them as gentle and graceful as possible" (Montessori, 1967/1949, p. 277). In more recent times, two experts in Montessori Methods for dementia also emphasized the importance of positive body language both for the residents and for the staff (Brenner & Brenner, 2020). They advise us to be aware of things such as the way we greet the people in our care. They remind us that "our smile and a positive attitude can uplift the elders we care for" (p. 20) and that "the simplest exchange can lead to the most profound moment of connection and joy" (p. 20). While positive body language is important for any person with dementia, it is all the more important for persons with dementia who have also been affected by trauma because people who have experienced trauma "tend to have problems accurately reading social cues" (van der Kolk, 2003, p. 299) and, consequently, they often "over-read, (mis-interpret) non-verbal cues" (Perry, 1999, p. 10), and wrongly interpret innocent facial expressions and body language as being threatening. Montessori communities for people living with dementia must consider and address where necessary how their physical and psychological environments promote a sense of safety and calm for both staff and clients.

In a lecture delivered in Kodaikanal, India, Montessori addressed this issue of physical and psychological safety in the context of the design of school buildings for children. She said, "Our idea is to build them so that they are psychologically satisfying, i.e., the building should correspond to the psychological needs of the children" (Montessori, 2013b, p. 11). She said that when we design buildings, we need to think about "the psychological contents" (p. 12) of each element of the buildings. For example, she said "the windows should be 'psychological windows' and not merely aerating windows" (p. 12). Similarly, with regard to the gardens, she said, "The garden must also have certain psychological dimensions," and she said it "should be well-sheltered from any dangers" (p. 17). Currently, photographs of Montessori communities for aged care and dementia show by their layouts that they are providing physical and psychological safety to elders with and without dementia (Brush, 2020).

By using a trauma-informed lens when trying to help a distressed older person, staff can avoid possible misinterpretations of the source of a person's distress. This involves considering "What happened to you?" rather than "What's wrong with you?" (Perry & Winfrey, 2021). This is particularly relevant to the area of personal care for persons living with dementia. Couzner and colleagues (2022) recount the case of Mrs. G., a 94-year-old woman with Alzheimer's disease who was admitted to the hospital after a fall at home. They wrote that Mrs. G. would become distressed, particularly during personal care, and this distress was accompanied by verbal and physical aggression. They state that the staff could not identify the triggers for this behavior until a family member disclosed that Mrs. G. had experienced sexual abuse in the past. Couzner states that the family and staff then identified that Mrs. G. was triggered by having personal care delivered by male staff and she found it disrespectful.

Trustworthiness and Transparency. The Montessori approach to aiding people living with dementia promotes trustworthiness and transparency by involving the residents in decisions about their daily routines and activities and by involving family members in the care of their relative. Montessori was remarkable in that from the outset of her work with children, she involved family members and specifically arranged for the mothers to talk with the directress, giving her information concerning the home life of the child and receiving

helpful advice from her (Montessori, 1964).

Peer Support. The third principle regards how the Montessori approach to aiding people living with dementia promotes peer support by giving opportunities to residents to work together on everyday tasks such as washing dishes, preparing snacks, and raking leaves in the garden. During these joint activities, residents have natural opportunities (as opposed to formally organized opportunities) to talk with peers and share experiences, both good and bad. It also promotes peer support by giving opportunities to residents to have positive relational interactions with staff members, which may lead to opportunities for a staff member to share experiences with a resident. Most people experience such things as the loss of, or illness in, a loved one, and often it is therapeutic when a staff member (whose familiar experience makes them a peer) shares their story of grief or loss with a resident.

Collaboration and Mutuality. The Montessori approach to aiding people living with dementia promotes collaboration and mutuality by collaborating with the resident and their family to gather information about the person's preferences. Brush writes that staff collaborate with the elder to create a "Meaningful Engagement Plan within two weeks of the individual's move onto the community" (Brush, 2020, p. 9). The plan is used as a guide for care partners to ensure that each person is participating daily in individualized activities and meaningful roles (Brush, 2020). Additionally, by involving all staff members in the elder's "Meaningful Engagement Plan," the care approach, according to Brush, becomes a community-wide effort wherein all staff members, having been educated in the Montessori philosophy, can collaborate to help the elder person to experience well-being. This well-being is most successfully achieved when staff members work together to introduce, support and prompt elders with self-chosen activities and self-chosen roles when needed (Brush, 2020).

Empowerment, Voice, and Choice. The fifth principle regards how the Montessori approach to caring for people living with dementia promotes empowerment, voice, and choice. It is an approach that empowers a person by focusing on their preserved strengths. For example, persons with dementia may have lost the ability to talk but may still have preserved the ability to read. Camp explains that persons with dementia frequently retain some abilities or "pockets of strength," far into the progression of their illness (Camp, 2012, p. 33). He says that an ability "that often remains far into the course of

dementia is the ability to read" (p. 33). The Montessori approach also fosters listening to the voice of residents, and it involves them in shared decision-making. Finally, it is an approach that provides choice by laying out materials in a manner that makes them attractive, inviting, and accessible. This exactness in the layout enables a person to choose which materials they wish to work with. Brenner and Brenner (2020) show that the provision of choice allows for a feeling of being in control, which can result in a reduction in anxious or frustrated behavior. They explain that by giving someone a choice, large or small, you are giving them a sense of autonomy, a feeling of dignity and respect.

Cultural, Historical, and Gender Issues. The final of the six principles, the Montessori approach to caring for people living with dementia actively acknowledges and respects cultural, historical and gender issues. Since the Montessori Method is based on respect for each human being, a thoughtful and even reverential approach to diverse cultures and multi-cultural practices has always been a part of the Montessori approach. Throughout her life, Montessori worked in many countries with peoples of diverse cultural and religious traditions, and she embraced them and regarded herself as a citizen of the world. This respect for diverse cultures is replicated in Montessori communities for aged and dementia care through the honoring of the customs, festivals, art, music, and culinary dishes of different cultures. In Camp's beautiful book *Hiding the Stranger in the Mirror*, he tells a very touching story of an Aboriginal lady who was described by staff at her facility as being very "resistive" to taking a shower (Camp, 2012, p. 30). He says, "the staff member then visited the village where her resident had lived and came back with a plan" (p. 30). The plan involved leading the resident outside where she happily sat on a rock with screens around her and with the aid of a garden hose, washed herself in keeping with the customs she had used for years in her former home. Camp states that "there were no more 'problems' regarding the resident keeping clean" (p. 30).

Montessori lived through two world wars and several other conflicts, and she was very much aware of the impact of historical trauma on human beings, especially in their later life (Montessori, 2013a). She devoted much of her adult life to promoting environments that nurture peace between individuals (Moretti, 2021), a legacy that carries on in the Montessori Method for aged care and dementia (Brush, 2020).

Although it is not widely known, Montessori was an early activist campaigning for women's rights (Babini,

2000; Babini & Lama, 2000). Early in her career, she campaigned for the right of women to vote, to be paid a wage equal to that of their male coworkers, and to have the same educational and professional opportunities as men (De Stefano, 2022; Kramer, 1976; Trabalzini, 2011). Perhaps because of this, the Montessori approach has, from its inception, been an approach that is sensitive to gender issues. Montessori Methods for aged care and people living with dementia carries forward this approach. Respect for gender issues is embedded in the core principles, especially the principle of respect for the equality of men and women.

How the Montessori Method Provides a Sense of Belonging and a Strength of Community—Powerful Factors in Promoting Healing from Trauma

The third sub-theme of theme three relates to how the Montessori Method, when applied to dementia care, provides a sense of belonging and a strength of community, which are powerful factors in promoting healing from trauma. It offers an individual the warmth and sense of community or what Perry and Winfrey call "the power of connectedness," which has been shown to be a powerful factor in bringing healing from trauma (2021, p. 254). Perry and Winfrey write, "the brain is continually scanning the social environment for signals to tell you if you do or don't belong. When a person gets the signals—many of which are subconscious—that they belong, their stress response systems quiet down, telling them they're safe" (p. 263). In this respect, Montessori Methods for dementia have a unique capacity to make a person feel that sense of community, that sense of belonging described by Perry and Winfrey.

Relatively recent research shows that the Montessori approach to dementia care is having a positive effect on residents' emotions and behaviors. Brush and colleagues, describing the implementation of Montessori for dementia care, explain that the program aims to form and maintain a caring community that is attuned to the needs, interests, and abilities of the elders living in it by creating an environment that is carefully prepared to provide opportunities for choice, independence, self-initiated activity, and success. Brush and colleagues say that elder persons' lives are, therefore, enriched through their engagement in routines, roles, and activities, which fosters a sense of belonging and community and that this promotes well-being (Brush et al., 2018a, 2018b). Brush and colleagues also state that "elders reported significantly more positive emotions" (Brush et al., 2018a, p. 42).

Brush and Benigas (2019) reported an increase in positive facial expressions in residents. In addition, the research showed that elders reported an increase in "feelings of self-esteem and belonging" (Brush et al., 2018a, p. 4) and that observational research data indicated "increased engagement" in activities and the life of the community (Brush et al., 2018a, p. 42). These are very encouraging results indicating that Montessori Methods for dementia have the capacity to positively impact the lives of persons with dementia.

Discussion

This paper offers an original contribution to Montessori research in that it examines connections between Montessori elder and dementia care and trauma-informed approaches. To my knowledge, this is the first study to do this. Currently, the Montessori Method is recognized as a legitimate and helpful approach to caring for elders and people living with dementia. This paper has shown that this approach naturally incorporates what are now generally recognized as the six key principles of trauma-informed practice. However, what is not clear is to what extent the four Rs emphasized by SAMHSA are incorporated into Montessori for dementia training programs. To be able to *realize* the widespread impact of trauma, to *recognize* the signs and symptoms of trauma, to *respond* by fully integrating knowledge about trauma into policies, procedures, and to actively *resist* re-traumatization requires interdisciplinary knowledge about the neurobiology of trauma, and the impact of trauma on the mind and body. This kind of interdisciplinary knowledge can best be gained through attendance of staff at trauma-informed programs or by integrating modules on trauma and trauma-informed practice into the general training of Montessori for dementia personnel.

While, initially, it might look as if the possible association of childhood trauma with dementia complicates matters, it may well turn out to be the very reverse. If we have an understanding of the neurobiology of trauma, how trauma affects our brain and body, our stress response systems, the role of adaptive responses, the problem of trauma triggers, and most importantly, what caregivers can do to help a person to regulate their mind and body when they become hyper-aroused as the result of a trauma trigger (which could take the form of a memory, a color, a smell, a sound, or a sight), we will be in a better position to understand, empathize with, and help persons with dementia. This is what Montessori

attempted to do when she began to understand the neurobiological impact of trauma on children. She saw the importance of approaching trauma from an interdisciplinary standpoint. This was what impelled her to try to organize groups of experts to come together to share their diverse professional knowledge and devise trauma-informed training for nurses and teachers who would work with traumatized children to help them to heal.

Currently, when we care for persons with dementia who may have been exposed to childhood trauma, we cannot go back in time to give them the help they so desperately needed in the past. However, we may be able to help them now. Trauma does not magically heal with the passing of time, but often stays in the body at a cellular level, triggerable at any time. However, recovery can occur when certain factors, which have proved to be healing, are present. As stated earlier, one of the most important of these factors is the healing power of community, and it is this power that makes the Montessori Method for dementia excel as an approach to dementia care. The combination of helping people to be as independent as possible, treating people with the greatest of respect, offering people meaningful activities, identifying, and supporting people's remaining strengths, allowing people to contribute to the environment they find themselves in, and building and supporting people's sense of self-esteem all combine to make Montessori for dementia communities unique in dementia care. This approach is trauma-responsive and healing by its very nature, but its ongoing roll-out should follow Montessori's lead by specifically integrating knowledge about the neurobiology of trauma and trauma-informed practice into its training programs.

Acknowledgements

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Book Review

Powerful Literacy in the Montessori Classroom: Aligning Reading Research and Practice

By Susan Zoll, Natasha Feinberg, and Laura Saylor
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Maria Montessori argued that the classroom she established in 1907 for children under school age left unsupervised during the day in an impoverished area of Rome opened the way for "putting into practice those new principles of science" which were revolutionizing the "work of education" (Montessori, 1964, p. 1). She noted that to "prepare teachers in a method of the experimental sciences is not an easy matter," while, at the same time, she warned her readers of the dangers of applying the experimental sciences to pedagogy in "a barren and mechanical way" (p. 7). For Montessori, a true scientific pedagogy was only possible if the classroom was organized as a social environment that enabled teachers to observe children's activity generated by materials and lessons that capture their interest (see, for example, Montessori, 1964, p. 107). Lessons that captured the interest of the children in that first Montessori classroom included tracing Sandpaper Letters and pronouncing

the corresponding sounds, learning to hold and control a writing implement using Metal Insets, and composing familiar words using a Moveable Alphabet. Montessori (1964) famously described how these young children were soon using chalk to cover the walls and floor of the classroom with familiar words before subsequently rushing to read and act out commands written on little cards.

A century on, as young children in Montessori classrooms around the world continue to engage with Sandpaper Letters, Metal Insets, Moveable Alphabets, and Reading Command cards, an accumulation of studies into how children learn to read from across a range of disciplines has generated an influential body of research evidence that has been dubbed the science of reading. The science of reading is currently being used to shape education policy and mandated curriculum documents, especially in the English-speaking world. For this reason,

the comparative analysis of the Montessori approach and the science of reading presented in *Powerful Literacy in the Montessori Classroom: Aligning Reading Research and Practice* will be welcomed by many Montessori educators.

The book is organized into eleven chapters. The first two chapters provide overviews of Montessori education and the science of reading. Chapter 1 includes a brief synopsis of the provenance and history of Montessori education with a focus on its early adoption in the United States following the first international Montessori training course. The authors review key features of the pedagogy; these features include personalized instruction and a systematic, structured learning progression across all learning areas, as well as learning materials designed to isolate difficulty and control error. This section also helpfully describes the features of the prepared Montessori environment in terms of five classroom design elements found by Barrett et al. (2013) to improve student learning. This evaluation of the Montessori environment through the lens of a comparatively recent evidence-based conceptual framework foreshadows the use in subsequent chapters of the Reading Rope taxonomy to align the Language component of the Montessori curriculum with evidence emerging from science of reading research.

The overview of the science of reading in Chapter 2 begins by establishing what is meant by *science of reading* for the purposes of this book. This is an important step because, as the authors note, the term science of reading is interpreted in varying ways in the multiple contexts in which it is used, including inaccurately in many popular contexts when the term is conflated with phonics only. This chapter also provides an example of science of reading translated into practice, an acknowledgement that science "is one kind of thing (empirical findings and explanatory theories)" while "educational practice is another (activities that promote learning in real world settings)" (Seidenberg et al., 2020, p. S121).

Chapter 2 includes a section that reviews three seminal reports presented as the "foundations of reading research" (p. 34) followed by an explanation of the Simple View of Reading (Gough & Tunmer, 1986; Hoover & Tunmer, 2021) and its elaboration in the well-known Reading Rope framework (Scarborough, 2001). The Reading Rope framework expands into their constituent skills the two main components of skilled reading identified in the Simple View of Reading: Word Recognition and Language Comprehension. This framework is used very effectively to organize the subsequent chapters of the book.

Chapter 2 concludes by drawing attention to the overlapping principles that underpin both Montessori pedagogy and instructional practices based on the science of reading. This overlap embraces multisensory, systematic, explicit, and interactive teaching approaches alongside opportunities for the extended practice and repetition that lead to word recognition automaticity and comprehension—the ultimate goal of reading instruction.

The overview chapters are followed by two separate parts of the book organized, as noted above, according to the strands of the Reading Rope framework. Including a short introduction and conclusion, "Part I: Word Recognition" comprises three chapters: "Phonological Awareness" (Chapter 3), "Decoding" (Chapter 4), and "Sight Recognition" (Chapter 5). Similarly, "Part II: Language Comprehension" has a short introduction and conclusion, and five chapters: "Background Knowledge" (Chapter 6), "Vocabulary" (Chapter 7), "Language Structures" (Chapter 8), "Verbal Reasoning" (Chapter 9), and "Literacy Knowledge" (Chapter 10). Each of the chapters in Parts I and II are structured in the same way: an introduction followed by a summary of the featured reading skill and how to teach it from the science of reading point of view, a selection of materials and lessons used in Montessori early years classrooms to address the skill, and, finally, exemplar activities for teaching this skill drawn from the structured literacy approach.

The three chapters of Part 1, mapped against the word recognition strands of the Reading Rope Framework, cover knowledge and skills that, ideally, are taught systematically, are learned relatively quickly, and are assessed comparatively easily during initial instruction in the early years of school (Paris, 2005). In each chapter, the science of reading principles underpinning each of these strands are reviewed in summaries that will become useful resources for teacher education programs or teachers wishing to refresh their knowledge. The authors ensure key terms are clearly defined while distinguishing between commonly confused terms, for example, *phonological awareness*, *phonemic awareness*, *phoneme*, and *phonics*. They also draw attention to the fact that while phonological awareness is the foundation on which sound-letter knowledge (decoding) is built, which in turn supports sight recognition, as these skills develop, they reinforce each other, indicating that integrated instruction in all three is the most effective approach.

As the authors point out, the Montessori lessons and materials that support the word recognition strands of reading development are largely located in the Language area of the classroom and include iconic

Montessori materials such as the Sandpaper Letters and Moveable Alphabet. The authors should be commended for highlighting both sound discrimination in general as a skill that makes phonological awareness possible and the Montessori Sensorial materials, through which children develop and refine this skill, including the Sound Cylinders and the Bells. In the decoding chapter (Chapter 4), the authors highlight Montessori materials, specifically the Geometric Cabinet, Geometric Solids and Metal Insets, that build visual discrimination and fine motor skills to support the ability to distinguish between and form the letters of the alphabet. They also describe in detail how, in Montessori settings for young children, the alphabetic principle—the relation between sounds and letters—is introduced during three period lessons with the Sandpaper Letters. From this point, encoding—making words using the Moveable Alphabet—precedes and prepares for later decoding.

Chapter 5 provides an overview of the evolving use of the term *sight words*, originally used for words that are not easily sounded out but which, from the science of reading perspective, is applied to all words that a reader can recognize automatically on sight, including high frequency words. The chapter provides a review of the approach for teaching writing and reading in English-speaking Montessori classrooms developed by Muriel Dwyer (1977) to address the fact that sound-letter correspondence is far less consistent in English orthography than in Italian, the language used in Montessori's first classrooms. The authors argue convincingly that in light of science of reading evidence, Montessori teachers in English-speaking classrooms may need to review some elements of this approach, including the notion of puzzle words. The original list of puzzle words in Dwyer (1977, p. 14) includes words not easily sounded out such as *I, the, put, was, one, are*. Interestingly, the examples used in Chapter 5 (*that, them, this*) can be sounded out quite easily and are better described as high frequency words, thus illustrating the shift in our understanding of sight words over recent decades, and perhaps underscoring the need for Montessori educators to clarify the current use of the term *puzzle words*.

"Part II: Language Comprehension Overview" draws attention to language skills underpinning skilled reading, skills that develop from infancy across the lifespan (Paris, 2005). As well as summarizing the five strands of language comprehension from a science of reading perspective, these chapters reveal how the knowledge-rich Montessori curriculum supports the development

of every dimension of reading comprehension. Relevant materials described in Part II include the three-part classification cards and definition booklets that feature in every Montessori learning area as the culmination of series of lessons that have their origin in concrete experience (Table 6.1), alongside charts such as the "Fundamental Needs of Humans" and the "Timeline of Life." Chapter 7, "Vocabulary," highlights morphology (word study) in Montessori classrooms, important because English orthography is *morphophonemic*, the alphabetic code not only being used to represent sounds (phonemes), but also meaningful parts of words (morphemes). Unfortunately, there is no mention in this chapter of the study of etymology, which is such a distinguishing feature of Montessori elementary classrooms.

Chapter 8, "Language Structures," highlights another distinctive feature of the Montessori curriculum: the series of Functions of Words and Grammar Box activities through which young children build both reading fluency and knowledge about grammar using manipulable materials. The authors could have expanded upon the role of the Montessori grammar materials as a bridge that leads children from decoding words to comprehending the meanings of connected text. They also could have pointed out the ways interaction with the Montessori grammar materials support children's development of "Verbal Reasoning" (Chapter 9).

By comparing the Montessori reading curriculum with instructional practices aligned with the science of reading, the authors of *Powerful Literacy in the Montessori* classroom have achieved their goal of helping Montessori educators "see the familiar in a new way" (p. 12). Realizing the full potential of this project, however, is beyond the scope of one publication. The matrix on Montessori Materials and science of reading in the appendix demonstrates that there are many more Montessori materials and activities to consider in terms of their alignment with the science of reading. Readers looking forward to using this matrix should be aware that, unfortunately, the e-book version of this handy resource is not easy to follow.

The wider Montessori community would benefit if this book prompted further investigations into how or where Montessori pedagogy aligns with evidence-based teaching practice. This suggestion is made with several caveats. First, for every strand of the Reading Rope, in addition to selected Montessori activities aligned with that strand, the authors have provided exemplar

teaching activities from conventional classrooms that "might be considered for adaptation in Montessori classrooms to further support learning" (p. 49). Careful consideration needs to be given to how these exemplars might be adapted for Montessori classrooms given the study results reported in Lillard (2012) and Lillard and Heise (2016). This evidence suggests that high-fidelity Montessori programs result in significantly better student outcomes than Montessori programs supplemented with conventional materials and activities.

As an example, the question can be raised whether it is necessary to supplement Montessori reading materials with commercial decodable readers of the type listed by the authors in Chapter 4. The Montessori curriculum already provides many opportunities for teachers to provide individual children with tailor-made decodable text. For the Object Boxes and Word Reading activities, Reading Commands, Functions of Words, Reading Analysis, and Grammar Boxes, rather than relying on generic, commercially available cards and labels, teachers can write their own, customizing the text to provide practice with decoding the specific letters and sounds individual children have already learned while also making meanings that reflect their current interests and experience. Montessori teachers in earlier times prepared cards and labels by cutting out and writing them by hand. With the advent of computer technology, it is now much less time consuming to ensure children will always find something new, personalized, interesting, perhaps even humorous, and decodable to read in the baskets and boxes that house the Language materials on the classroom shelves. In addition, Montessori teachers have traditionally made Little Books (Dwyer, 1977), created especially for those in the class just starting to read. These Little Books, sometimes called First Books, are in effect decodable readers, even though they have been used in Montessori classrooms from long before the term *decodable* gained currency.

Aligning science of reading evidence to Montessori practice should also account for the global reach of Montessori education. Many children in Montessori schools around the world are learning to write and read in non-European, non-alphabetic orthographies. For this reason, Montessori educators need to be aware that the science of reading research agenda, based as it is on the alphabetic principle, has been described as potentially insular and Anglocentric (Share, 2021).

Finally, looking past the science of reading foundation documents reviewed in Chapter 2, it is worth noting that the science of reading research agenda is

"a moving target" (Seidenberg et al., 2020, p. S121). Science of reading evidence, as is inevitable in the research space, continues to be reviewed, debated, and contested (for example, Castles et al., 2018; Shanahan, 2020; Thomas, 2022; Wyse & Bradbury, 2022). In contrast, Montessori pedagogy remains a still point in the evolving history of educational practice, a history characterized by competing research agendas. *Powerful Literacy in the Montessori Classroom* successfully aligns the science of reading evidence with Montessori practice and provides compelling evidence of Montessori efficacy in the Preface (e.g., Culclasure et al., 2018; Lillard et al., 2017). Combining these factors with the resilience of the pedagogy over more than a century suggests that Montessori education—when implemented with fidelity—can provide mainstream education with models of effective practice worth emulating. For this reason, Montessori educators should not feel they must always measure themselves against current trends, but instead might look for opportunities to demonstrate to those in the wider education community the effectiveness of Montessori practice, which has defied obsolescence for so long.

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Rediscovering the Child: Review of Montessori Action Research Studies 2022–2023

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Abstract: Action research is the term used for investigations done in the field, often by practitioners, and typically with a pragmatic rather than theoretical purpose (Willis & Edwards, 2014). This type of research is a key part of many Montessori teacher education programs, but the value of this important work is often lost to the field because the papers reside in separate institutional repositories with limited indexing. The *Journal of Montessori Research* is introducing a new annual review article series which features selected graduate student action research studies. The authors of this recurring series of articles represent Montessori teacher preparation programs and other university-based research roles. They will select studies that they believe are particularly high quality and relevant to the journal's readers. We are calling this series of articles "Rediscovering the Child" to honor Maria Montessori's seminal work and to acknowledge that all Montessori teachers engage in an ongoing process of rediscovering the children in their classrooms. When this process is formalized, action research is the result. This article is the first in the series and highlights six studies from University of Wisconsin-River Falls and St. Catherine University. In the coming issues, we will likely refine some aspects of our selection and review processes and expand the programs represented.

In the first chapters of *Discovery of the Child*, Montessori (1967) recounts the experiences leading up to her most noteworthy work in the first Casa dei Bambini. After explaining that she was a student of philosophy and took courses in experimental psychology, she stated,

> I wanted to experiment with the various methods used successfully by Seguin with children when they first came to school at the age of six untrained and unlearned. But since we are constantly hampered by our habits and prejudices, I never thought of applying these same methods on preschool children. The opportunity of doing so came to me by pure chance. (p. 33)

Reading like a personal journal, she described the ideal opportunity that the San Lorenzo housing project presented to develop a scientific method for discovering the child. She continued,

This ambitious idea of being able to help in man's development through scientific methods of education during that period of life in which his intelligence and character are being molded had not struck me despite my keen interest in this question…[but] chance played its part. As a matter of fact, chance, that is, a peculiar set of circumstances, must almost always provide the spark to an intuition. (p. 34)

Thus, long before the term *action research* was introduced, Montessori was engaged in systematic efforts of experimentation and observation to support children's learning.

Today, Mertler (2020) describes action research as "grassroots efforts to find answers to important questions and to foster change" (p. 11). In educational research, action research is particularly valuable since it offers teachers an opportunity to reflect on and improve their practice. Action research is typically characterized by a few key features (Mertler, 2020). First, it most often employs qualitative research methods, which emphasize the unique context and circumstances under study rather than generalizability to a larger population. The practitioner-researcher employing action research methods also deeply considers their own participation in the classroom dynamic because they are both a practitioner and a participant. Finally, action research necessarily includes reflection so that educators "critically think about their actions and interactions, confirm or challenge ideas, and take risks" (Miller, 2011, as cited in Mertler, 2020, p. 16). In Montessori teacher preparation programs, formal action research serves two main purposes: a) to inform the practitioner of the research question under consideration and b) to inform *other* practitioners who may have similar circumstances and contexts.

The authors of this article represent two university-based Montessori teacher preparation programs in the United States, and we are pleased to feature a small number of the excellent studies completed by students in our programs over the past two academic years that we believe will be of particular interest to the readers of this publication. Each of the sections below provides overviews of the purpose and role of action research in the respective graduate program and of the design and results from three individual studies performed by students.

University of Wisconsin-River Falls

In 2012, Gay Ward, professor of children's literature, chose to integrate the action research methodology into the new Montessori Teacher Education Program that she founded at the University of Wisconsin-River Falls (UWRF; Ward & Miller, 2019). Today, Ward, who is also the recipient of the American Montessori Society (AMS) 2024 Living Legacy Award, continues to support UWRF students with their action research projects. These projects represent the culmination of the Master of Science in Education (MSE) program that includes coursework to earn AMS Montessori credentials for ages 3–6, 6–9, and 6–12.

UWRF explains the relationship between its focus on current research and Montessori coursework in the MSE program by using the analogy of building the Pink Tower. Starting with the largest cube, the foundational coursework commences with Montessori Philosophy and Pedagogy but then, immediately, the next "cube" of coursework integrates a research perspective and practicing research skills. In other words, all throughout the UWRF MSE Montessori program, students are constructing their own towers including both research and credentialing content. The entire master's program builds and develops the action research skills needed for the final paper which more than meets AMS's yearlong teaching practicum project requirement for the credential. For example, in their first course, UWRF graduate students gain familiarity and fluency with American Psychological Association standards for scholarly writing, Montessori philosophy and pedagogy, and read contemporary neuroscience research. In the second semester, the observation course addresses the role of self-reflection as it pertains to both action research methodology and the Montessori Method. In this same course, graduate students design a qualitative or quantitative instrument to measure an identified need in their classrooms. Then, they use the instrument, code the data, and confront the decisions of how to best represent this data. Through specifically designed and carefully sequenced assignments like these, the UWRF MSE Montessori program intersperses research skills, critical inquiry, and current literature throughout the Montessori credential graduate school experience. During the 2020 revision of the UWRF MSE Montessori program's mission, vision, and values, the tagline *the intersection of authentic Montessori and research* emerged and will be used in informational materials in the future.

The three papers featured here represent well-designed and executed action research projects done at three different levels: 3–6, 6–9 and 9–12.

Moats, E. (2023). *Together in one spirit: The effects of a Montessori classroom team's spiritual preparation on classroom harmony* [Master's paper, University of Wisconsin-River Falls].
http://digital.library.wisc.edu/1793/84590

Moats, an Early Childhood teacher, and her team came to powerful conclusions about their teaching practice through an action research project. Moats, who set out to study the spiritual development and its impact on the learning environment, aimed to identify traits and behaviors of leaders and colleagues that support the healthy spirituality necessary for a harmonious classroom. Through an innovative collection of instruments such as pre/post surveys, an interactive video journal application called Marco Polo, classroom observations, and a photo journal, she concluded that her connection to colleagues, children, and families increased through intentional communication, both in times of ease and flow as well as in times of challenge. Acceptance of cycles of joyful and difficult times also contributed to the development of the team's shared spirituality.

Bladow, J. L. (2022). *Supporting evidence-based writing in the Upper Elementary Montessori classroom: The interplay of the dynamic guide and original materials* [Master's paper, University of Wisconsin-River Falls].
http://digital.library.wisc.edu/1793/83423

Bladow, an Upper Elementary Montessori teacher in a public Montessori setting, witnessed her students struggle with both the Wisconsin Fast Forward exam and state standard of evidence-based writing. This participant-researcher designed an extensive series of Montessori materials with color coding, modeling, and self-correcting/self-monitoring components that were used as tools in the 12-week action research study. While the research was highly formative to this Montessori teacher who was not new to teaching but rather new to Montessori, one of the greatest and unexpected take-aways of the action research was that her students' self-perceptions as a "writer" or "not a writer" tangibly influenced mastery of the steps needed for successful evidence-based writing on a standardized test. After completing this paper, Bladow continued the iterative process of action research in her classroom the subsequent year and saw evidence of positive results on standardized tests for this writing skill.

Kruchten, M. (2023). *Student experiences during unstructured play periods* [Master's paper, University of Wisconsin-River Falls].
http://digital.library.wisc.edu/1793/84609

In an urban charter school with a significant population of children with special needs, Kruchten examined the implementation of "choice play time" at the end of the day in her Lower Elementary classroom. Her study challenged existing beliefs about allowing figurines from home and play items such as sunglasses and play phones in a Montessori classroom. Kruchten made some surprising and important conclusions about items brought from home: they were clear supports for self-regulation, community building, and meeting the needs of individuals. This action research project concluded that in this teacher-researcher's population, a play period with tangible objects aided social emotional skill development, was therapeutic, and promoted self-regulation skills.

St. Catherine University

The Montessori Education and Leadership program (formally, AM2) at St. Catherine University was created to support teachers earning a Montessori credential by awarding university credits for Montessori coursework, which could then be applied to a Master of Arts in Education (MAEd) degree. The program leverages the deep learning and comprehensive nature of teacher education programs accredited through Montessori Accreditation Council for Teacher Education (MACTE). Graduate students complete their degrees with 16 additional credits built on the tenets of the Montessori Method as they pursue what Montessori educators call preparation of the adult (Jendza, 2023), which includes courses on holistic practices, critical analysis of Montessori education, and educational leadership. Students complete the program with a series of action research courses.

Action research was a clear choice for the research methods requirement for the Montessori Education and Leadership program because Montessorians are trained in the art of observation. The intentionality of action research elevates observation practice for graduate students who begin by creating an intervention starting from an inquiry statement. They continue by articulating a supporting theory and conducting background research followed by implementing an intervention. The action research process occurs alongside acknowledgment of personal biases and a critical examination of current practices and systems.

Recent shifts in the action research approach at St. Catherine include moving away from a primary focus on a problem statement to a new centering on areas of inquiry. This shift allows a research process that is more open to potential areas of study that are not necessarily rooted in a negatively viewed problem. Transitioning away from a problem orientation aligns with an asset mindset in the classroom, which is rooted in the strengths of students, families, and communities. Finally, the action research process supports Montessori educators in developing their own grounding theory as education professionals. The studies highlighted here represent examples that illustrate the importance of practitioners articulating a theory that weaves throughout the research process.

Keller, K. (2023). *Breaking bread: Co-creating mindful eating practices in Lower Elementary* [**Master's thesis, St. Catherine University**].
https://sophia.stkate.edu/maed/503/

In this study, Keller began with a foundation of Social Cognitive Theory and an inquiry statement about the impact of multicultural culinary food on fear of trying new foods in a Montessori Lower Elementary classroom. The research involved food preparation and mindful eating strategies with repeated exposure. The findings indicate that student involvement in food preparation and educational activities minimized fear of trying new foods in this setting. Keller's work provides guidance in best practices to introduce new foods while connecting food to culture. However, Keller also provides clear connections to grounding all our work in the student's cultures and interests and creating an environment that values new experiences to benefit all learners.

Torres, K. (2022). *Finding roots in the Montessori social studies curriculum* [**Master's thesis, St. Catherine University**]. **https://sophia.stkate.edu/maed/489/**

This action research project used the culturally sustaining theory and antibias, anti-racist frameworks. The aim was to determine if the teacher-researcher learning about her own culture followed by an equity audit of a Montessori social studies curriculum impacted her feelings of self-efficacy and resilience. The intervention was conducted over the course of six weeks and included the researcher studying her own history and culture as a Puerto Rican with ties to the Taino Indigenous people and then creating culturally sustaining lessons to augment the Montessori social studies curriculum. The data collected suggested that the teacher-researcher's self-efficacy was strong throughout

the study, but resilience wavered and declined over the six-week period. Findings suggest that the effort to inform and create new lessons can increase perceived efficacy, but systems are needed to better support teachers of color in engaging in this demanding work.

Anderson, D. (2022). *The impact of discourse on math learning in Upper Elementary* [**Master's thesis, St. Catherine University**].
https://sophia.stkate.edu/maed/460/

Anderson's inquiry investigated the complexity of the Montessori mathematics curriculum in Upper Elementary through exploring the efficacy of differentiating discourse methods to support math learning through the lens of constructivism. This intervention encouraged students to apply discourse strategies and to engage in mathematical modeling. The research data measured the impact on student mindset, behavior, and participation in the subject. Findings suggested that students' engagement in discourse positively impacted their mindsets toward engaging in math. However, Anderson noted that additional research is required to quantify gains over an extended period. Anderson's research sheds light on the complexity of the content area and the need to support critical thinking. The findings from this study indicate that differentiation of discourse strategies to increase vocabulary, assist in problem-solving, and utilize visualizations or peer support to assist in the cuing process help to aid learning with concrete manipulatives in this setting.

Conclusion

While we have provided links to the studies reviewed in this article on the respective institutions' websites, the American Montessori Society also includes submitted Montessori action research projects in its online Research Library (2023). Although the library's action research content is not comprehensive, the searchable database benefits those who want to learn from existing research studies, especially their instruments, designs, conclusions, and study limitations. Finally, authors of comprehensive and well-designed action research often submit their studies for consideration for the *Journal of Montessori Research* or for poster sessions at major Montessori conferences and events. The selection process for acceptance at these venues is competitive so that only strong studies are included. Consequently, these avenues benefit both the researcher who is able to share further details about their work and for practitioners to learn

about the challenges and solutions of other educators while they network, ask clarifying questions, and meet other Montessori researchers from around the world. We encourage you to read further about the action research studies featured in this article and to explore action research available through other avenues. The next edition of Rediscovering the Child is planned for the fall 2024 issue of the *Journal of Montessori Research*.

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