



MPPI Releases The Landscape Analysis

The Montessori Public Policy Initiative is pleased to announce the completion of our Montessori Policy Landscape Analysis, generously funded by the Walton Family Foundation. Under the project management of Dr. Charis Sharp and former AMI-USA Executive Director, Bonnie Beste, the MPPI Council devised a list of questions used to establish a baseline assessment of the policy landscape in each of our states with MPPI state representatives. Three main areas were explored: Childcare Licensing, Teacher Credential Recognition, and Quality Rating and Improvement Systems. Additionally, a case study was done on the topic of Student Assessment.

The data from this Landscape Analysis creates a base of data for MPPI's advocacy work and the work of our MPPI state representatives. We are beginning the process of building a new, more interactive MPPI website, and this information will eventually live there as a searchable database. As you read through this material, available through the links below, note that some of the information comes from research into state law and regulations, and some are from the accounts of our MPPI state representatives.

Implications of State Policy for Montessori: Summary of Findings of 2017 Landscape Analysis

Introduction

In early 2017, the Montessori Public Policy Initiative (MPPI), with funding from the Walton Family Foundation, commissioned Bellwether Education Partners to conduct a landscape analysis of several key policy areas affecting Montessori programs. Through this analysis, the Bellwether research team produced a state-level database with responses to a series of questions about potential barriers in each policy area.

This brief is a companion document to the database. It provides a summary of the process used to create the database, high-level analysis of the trends identified in the database, and recommendations for maximizing the efficacy of state-level Montessori advocacy.

Background and methods

The database contains information on thirty-seven states in three strategic state policy areas: child care center licensing, quality rating and improvement systems (QRIS), and teacher credential recognition. MPPI determined the focus policy areas for this project based on their perceptions of shared issues across states, requests from advocates, anecdotes from specific programs, and their own experiences with common barriers to providing authentic Montessori experiences.

Why isn't assessment included?

Initially, MPPI hoped that the landscape analysis would survey state policies on required K-12 and ECE student assessments. MPPI's hypothesis was that these requirements are a barrier to authentic Montessori practice, and states may grant accommodations to them.

The policies governing assessment, however, are much more complicated than those affecting QRIS, licensing, or credentials. District, state, and federal policy all govern assessments in different ways; analyzing only state-level requirements would show a misleading fraction of the full story, and analyzing policy for every district in every sample state is outside of the scope of the project. Instead, the MPPI and Bellwether team decided to produce a case study on assessment policy in Montessori schools. For more information on the evolution of this work, read the accompanying [Assessment Case Study](#).

After the MPPI team decided on these policy issues, they worked with Bellwether Education Partners, a nonprofit education research and strategy organization, to conduct the research. Together, MPPI and Bellwether developed a rubric to assess states on the extent to which their policies and policy implementation in these areas create an environment conducive to offering authentic Montessori experiences.

Previously, state advocates shared this information among themselves in an informal, ad hoc way; if you had the right conversation with the right person at the right time, you could learn from another state's experience, but otherwise there was no way to gather information from other states about their current advocacy efforts and regulatory environments, and learn from them.

This database allows Montessori advocates to better understand areas of strength and challenge around advocating for policy environments conducive to Montessori programs in their own state, and find states that have

successfully navigated similar issues. It provides a valuable resource for Montessori advocates to capitalize on the progress made in other states, learn from their peers, and affect the policy landscape in their own state.

The rubric's questions seek to answer, at a high level, the following question for each state and policy area: Are the policies and regulations that govern this policy area, as written and implemented in the

state, a barrier for Montessori programs? The final rubric consists of more than three dozen questions, about half of which focused on the current state of that policy area, while the other half focused on progress that Montessori state advocates have made on securing accommodations to policy barriers, if any existed.

To answer the rubric questions for each state, the Bellwether team conducted desk research and in-depth interviews. Through the desk research, Bellwether pulled all available public information on the topic areas, including legislative language, agency guidance, and third-party analyses. This first step was crucial for understanding the state's context, and what was technically "on the books" about these policy areas. To complement this research, the Bellwether team conducted more than 70 interviews with state Montessori advocates. The purpose of these interviews was to confirm that the public information was accurate, to gather information about how the policies are interpreted by the agency staff implementing them, and to add color and detail about specific program experiences. For the project's interviews, MPPI developed the list of interviewees.

Taken together, the desk research and interview notes allowed the Bellwether team to produce a profile of each state. Each interviewee was given the opportunity to review their state's profile for both accuracy and completeness before the database was sent to MPPI. All but four interviewees reviewed their state's profile. At the time of writing, all 37 state profiles were combined into an Excel database. There are four tabs in the workbook: one for each policy area. Each of these policy tabs contains the rubric questions, with qualitative data from interviews and desk research answering those questions and a high-level summary of the state's findings for that policy area. State advocates using this document can filter certain states or questions, compare answers across all states or a subset of states, identify resources and potential solutions, and leverage the expertise of their counterparts in other states.

Context on policy topics

Before presenting an analysis of the findings, some context about these policy areas is necessary; specifically, how and at what level these policies affect Montessori programs.

Child care licensing requirements and *quality rating and improvement systems (QRIS)* both apply to centers and programs. Child care licensing requirements set a minimum baseline of safety and quality standards, which theoretically prevent programs that are developmentally or physically harmful to children from operating. Licensing rules regulate many facets of program operations, from building materials and staff qualifications to daily activities and parent involvement. Quality rating and improvement systems take the same standards-based approach used in child care licensing and expand it to define multiple performance levels rather than one minimum bar. A QRIS "grades" programs on their ability to meet increasingly rigorous sets of standards. In most states, programs' or centers' "grades" are then made

Limitations

The information in this database is based on public policy documents where available. To understand how these policies play out in practice, however -- which is arguably the more relevant information -- the Bellwether team relied heavily on interviews with state Montessori advocates.

Advocates had varying degrees of knowledge and expertise on the subjects in the database. An advocate might only have experience, for example, with Montessori schools that never participated in QRIS, and so had less information on the specific processes and tensions that apply. Further, by definition interview data requires interviewees to answer in their own words -- so the policy interpretation of one interviewee may not be identical for all advocates across the state. **As a result, database content derived from interviews may not be precisely accurate according to an advocate or individual with either a different interpretation of the law, or deeper content knowledge on the subject.**

Despite this limitation, the database produced from this analysis is a functional information source that will be helpful in identifying issues that states face, trends and themes, and strengths and weaknesses. In order for people to drive successful advocacy in their state, they may need a more fine-grained, technical understanding of how policies and laws work in their state than this database can provide.

public to families, to support them in making informed decisions about early childhood providers. In many states, programs also have access to various benefits and supports, such as additional funding or professional development opportunities, based on their QRIS rating. Licensing standards are designed to set minimum health and safety parameters for programs to operate, while QRIS are intended to recognize and incentivize higher levels of quality above licensure. But licensure and QRIS are often connected: Licensure is the initial level in many states' QRIS, and some states requiring all licensed programs to participate in QRIS.

Teacher credential requirements, on the other hand, primarily affect individual teachers. All states have teacher licensure and certification systems or policies that determine who is allowed to teach in public schools in the state. If a teacher is fully credentialed in a state, it generally means that they have completed an accredited preparation program and passed a skills test¹. Depending on the state and type of school they teach in, a teacher may have to meet additional or fewer requirements. While these requirements focus on individual teachers, they may affect school- or center-level operations: Certain funding streams may require programs to hire individuals with specific credentials. Further, credential requirements restrict the supply of available teachers, because they require teachers from across state lines to meet additional requirements in order to teach in the state. There is also potential overlap with QRIS: Programs may be “dinged” or rated as lower for opting to hire teachers with Montessori training rather than state credentials.

The regulations that govern these three policy areas were designed with traditional schools and child care programs in mind. There are often different oversight rules based on the child's age. Similarly, the type of public funding a program can receive, and which state agency manages that funding, is also determined by age range. As a result, programs that serve children across multiple funding streams or age ranges can encounter tensions or duplication across the different agencies.

Effects on Montessori programs

These three policy areas can determine whether a state is conducive to authentic Montessori practice. The sections below explore some of the issues commonly encountered within these areas.

Child care licensing

In the vast majority of states in our sample, Montessori programs have to be licensed in order to operate. Programs are either licensed through the state education agency, or through the state-level Department of Health and Human Services (e.g., the Delaware Health and Social Services, Arkansas Department of Human Services). In most states in our sample, the licensing body depends on the age of the children served: Programs serving children older than kindergarten during the school day fall under the purview of the state education agency, while programs serving younger children are governed by the equivalent health, social services, or early childhood office. A good example of this scenario is New Hampshire: Programs serving children kindergarten-aged and below must be licensed by the state Department of Health and Human Services, while programs serving older children are licensed through the State Board of Education. (This division of responsibility isn't the case in every state; Wisconsin, for example, splits programs by provider type. Regardless of ages served, private programs fall under the Department of Child and Family Services, while public programs fall under the Department of Public Instruction.) And in more than half of states in our sample, if an elementary or secondary school operates a preschool or early childhood program, that school is exempt from the state's child care licensing rules.²

¹ States may also approve alternative certification or intern programs that allow people to teach without completing an approved program.

² Administration of Children and Families; Research Brief #1: Trends in Child Care Licensing Regulations and Policies for 2014. Published November 2015.

http://www.naralicensing.org/assets/docs/ChildCareLicensingStudies/2014CCStudy/center_licensing_trends_brief_2014.pdf

This age-based hand-off of oversight responsibility is a problem for Montessori programs: A key part of the Montessori instructional model is mixed age groups, where operate across multiple age ranges. It is very common for children, for example to be enrolled in a classroom for 3-6 year olds. Because of traditional age-specific oversight, however, if the state doesn't recognize the uniqueness of Montessori's structure, the 3- and 4-year-olds are under the purview of one agency, and the 5- and 6-year-olds are under another. The result is that programs live in oversight purgatory, where they fit into neither of the oversight frameworks. In response, states will often hold programs to the stricter, or more prescriptive, set of standards, which is generally the set governing early childhood programs.

9 states	Allow a teacher:student ratio of 1:15 or above for 4-year-olds
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In theory, Montessori programs have no problem meeting strict standards: implementation of an authentic Montessori program entails highly trained teachers, engaging and enriched environments, and quality research-based instructional materials. In practice, however, the Montessori instructional model is often at odds with licensing requirements that are based on a fundamentally different philosophy. Among the states profiled here, for example, most licensing requirements place limits on the number of children allowed in a group, teacher/child ratios, and mixed age groupings – all of which, if too restrictive, prevent programs from offering a key facet of authentic Montessori programming: large, student-directed classes, led by one teacher, with mixed-age groupings of children. The state requirements are teacher-focused, making one-on-one time between teacher and child the highest priority. The Montessori philosophy is student-focused, making the time the child is engaged in exploring and learning from their environment the highest priority. This is just one example of how the miss-match in philosophies puts the implementation of Montessori under state regulations at a disadvantage.

Given these tensions, advocates in eighteen of the profiled states have secured accommodations for Montessori programs in the licensure process. There are two common types of accommodations that these states allow: Approval for an alternative pathway to licensure, or exemptions from specific requirements.

Under the first scenario, a state may formally recognize an accreditation or recognition pathway, often operated by a third-party or different agency within the state, as equivalent to licensure. Once a program goes through that alternative pathway, it is considered licensed in the state, though with some conditions. In Illinois, for example, a program is exempt if it is accredited by a national or multi-state accreditation body, such as the Association Montessori International or the American Montessori Society, and if it is registered with the Illinois State Board of Education. In rarer instances, states in the sample approved separate, Montessori-specific state-level licensing bodies. Most child care programs in Texas, for example, are licensed through the Department of Family and Protective Services (DFPS), but Montessori programs can also be licensed through the Association Montessori International Teachers of Texas (AMITOT). AMITOT is a separate, non-governmental agency that has to report to DFPS about the programs it has licensed, but otherwise can approve programs on its own.

18 states	Grant Montessori programs some kind of accommodation in their licensing requirements
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Under the second scenario, a state may grant programs -- either individual programs or some subset of Montessori programs as a group – exemptions from specific child care licensing requirements. In almost all states in the sample, each program has to individually request specific exemptions in the licensing requirements, rather than the exemptions being automatically granted. In Florida, for example, Montessori programs can seek exemptions through the process used by all other child care programs. To date, advocates there have been relatively successful in securing exemptions for floor beds, but haven't managed to get exemptions for group size, teacher/student ratio, or mixed-age group requirements. And Colorado programs can apply to have "breakable" and "chokeable" items, which are often prohibited in state licensing requirements.

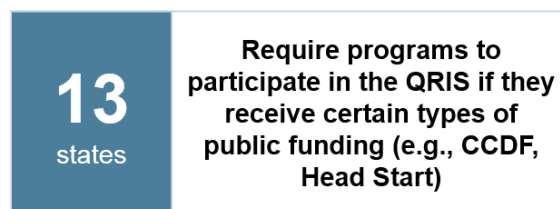
Other states in the sample allow exemptions only if the program is formally accredited or recognized as a Montessori program. AMI- or AMS-accredited³ programs in Kentucky, for example, are automatically allowed to have larger ratios and combine age groups (though only for 3-5 year olds, not infants and toddlers). In Maryland, “approved Montessori schools” – schools that have gone through the state’s Montessori-specific third-party validation process – are automatically exempt from a number of regulations, including the requirement for a balanced daily schedule and the restrictions on floor beds.⁴

Validation projects, like the one in Maryland, are an interesting opportunity for Montessori programs. Through these projects, state-level advocates come together to define the elements that must be in place in order for a program to be recognized as an authentic Montessori program. Interviewees from 24 states in our sample said they were working on, or had developed, validation projects. Advocates in California, for example, developed the Montessori Rating Scale for use in their state, and nearly 40 percent of programs in Tennessee have gone through that state’s validation process. Validation projects can give programs advantages that depend on the state; validated programs in Maryland, for example, have access to a set of child care licensure exemptions, and validated programs in Washington can apply for a group size exception.

Quality rating and improvement systems (QRIS)

Quality rating and improvement systems (QRIS) are multi-level, differentiated performance assessment systems intended to increase transparency about program quality and incentivize continuous improvement among programs.

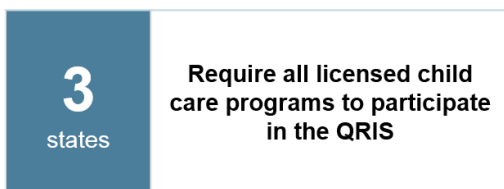
In the vast majority of states in the sample, Montessori programs are not required to participate in QRIS, largely because participation is voluntary for early childhood providers. But, as discussed above, there is significant overlap between QRIS and child care licensing: the first level of a state’s QRIS often requires that programs meet the state’s child care licensing requirements.



13
states

Require programs to participate in the QRIS if they receive certain types of public funding (e.g., CCDF, Head Start)

Further, there are financial incentives to participating in QRIS. In many of the profiled states, a program can only receive public early childhood funding if it participates in QRIS, and many others will use a tiered reimbursement structure where programs that have higher ratings on the state QRIS will receive higher reimbursement rates from state child care subsidy programs than those with lower ratings. In Washington State, for example, programs can only receive state pre-k dollars if they earn a Level 3 or higher on the state’s QRIS. Profiled states may also incentivize QRIS participation through quality improvement grants, which are one-time grants designed to help a program improve its quality, as defined by the QRIS. Other financial incentives include access to materials and supplies, professional development opportunities for staff, tax credits, higher education scholarships, and low-interest loans.



3
states

Require all licensed child care programs to participate in the QRIS

Many interviewees for this project indicate that QRIS participation is seen as not worth the effort it requires, in part because Montessori programs already operate at high levels of quality, and are regarded by parents as quality

options. This disincentive is often the case for early childhood providers: Financial analyses of the costs

³ Note: Association Montessori International (AMI) has three tiers of schools: recognized, affiliated, and associated. Recognized schools are the highest level; these schools must meet all AMI standards and 100% of their teaching staff must have an AMI diploma. For the purposes of this document, we use the AMS language for school approval – accreditation – rather than the AMI language of recognition. There are multiple instances of “AMI- or AMS-accredited programs” which, in the context of AMI programs, refers to recognized programs. For more information on the AMI tiers structure, see: <https://amiusa.org/becoming-an-ami-school/>

⁴ <http://www.marylandexcels.org/wp-content/uploads/2015/12/Child-Care-Center-Standards-March-2014-5.pdf>

to operate a center at the highest QRIS level in several sample states are higher than the subsidies that centers at these levels receive to serve low-income children. The additional costs to operate a higher quality levels exceeds the value or incentive of increased payments offered by the state. Further, in the sample states where most Montessori programs fall under the purview of the state education agency – such as Indiana and Tennessee – programs are not allowed to participate in QRIS, as it is generally managed by the state’s health or early childhood agency. (The Department of Human Services – Child Care Services administers QRIS in Tennessee, and the Family and Social Services Administration does so in Indiana.)

Montessori programs face a number of challenges when participating in QRIS systems. Of the states we profiled, 17 have some sort of QRIS requirement related to group sizes and teacher:child ratios. These are most commonly tied to either NAEYC-accreditation standards or the state’s licensing rules. In states where programs already feel challenged by their state’s licensing rules, tying these rules to the QRIS only increases that burden. Additionally, QRIS systems often require programs to have smaller group sizes or lower ratios in order to achieve a higher rating, or award those things in some other way. This disadvantages Montessori programs, even though decreasing group sizes and ratios is not related to improved instruction an authentic Montessori model.

Thirty-two states’ QRIS require an observational assessment, such as the Early Childhood Environmental Rating Scale (ECERS), the Classroom Assessment Scoring System (CLASS), or another tool, and often more than one. The vast majority of states in our sample that require an observational assessment require either ECERS or CLASS; twelve states require ECERS, five states require CLASS, and ten states require both. Through observational assessments, the assessor uses a pre-defined rubric to rate the classroom environment and, in some cases, teacher and child behaviors. Some challenges Montessori programs face with QRIS are related to these observational assessments, as these assessments reflect assumptions about what quality looks like in early childhood settings that differ from the Montessori approach. For example, if held to the standards in ECERS, a Montessori program would be faulted – and receive a lower QRIS rating – for not having a sand/water table in preschool classrooms. Montessori classrooms have materials that enable children to manipulate dry matter and liquids, similar to sand and water, in structured and unstructured environments, but following the letter of the ECERS assessment, the program wouldn’t meet the standard.

32 States	Have a QRIS that includes an observational assessment (e.g., CLASS, ECERS, ITERS)
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Taken together, these factors limit the number of Montessori programs interested in participating in QRIS. In some states, however, trends indicate that QRIS won’t be voluntary for long. Nationally, early childhood advocates and state and federal policymakers have promoted QRIS as a strategy to improve quality of child care; the federal Race to the Top-Early Learning Challenge program, for example, incented states to build universal statewide QRIS that include all licensed providers. Some states may expand QRIS participation as part of their new plans under the federal Child Care and Development Block Grant (CCDBG), which passed in late 2014 and placed an increased emphasis on quality. Future federal child care legislation could increase pressure for all licensed programs to participate in QRIS.

With this in mind, advocates are working to secure accommodations and recognition of Montessori programs in QRIS, and have been successful in some states. Accommodations generally fall into three categories (in descending order of flexibility for Montessori programs):

- **Automatic placement of accredited programs.** This accommodation is close to the ideal for Montessori programs. States automatically place either AMI- or AMS-accredited Montessori programs at a pre-determined level on the state QRIS. Currently, thirteen states offer this accommodation, though the approved accreditation pathways and exact rating that programs receive depends on the state. Colorado and Illinois, for example, both recognize AMS-accredited programs, but Illinois automatically grants those programs the highest rating in the QRIS, while Colorado only recognizes those programs at Level 3 (out of 5). Five states only recognize AMS-accredited programs, Georgia only recognizes AMI-accredited programs, and five states recognize both AMI and AMS.⁵ Further, of the states that do not recognize Montessori accreditation, 18 do recognize other types of accreditation pathways – such as accreditation through the National Association for the Education of Young Children, the National Early Childhood Program Accreditation, the Council on Accreditation, and affiliates of the National Association of Independent Schools. The approval of these other accreditation pathways suggests that it may be possible to secure recognition for Montessori pathways.
- **Recognition of certain Montessori elements.** The next best accommodation for QRIS, if automatic placement is not an option, is formal recognition or inclusion of certain Montessori elements toward the QRIS standards. For example, Level 3 on Minnesota’s QRIS, Parent Aware, requires that programs use an approved child assessment tool and a curriculum aligned with the state’s Early Childhood Indicators of Progress. The agency that oversees Parent Aware, the Minnesota Department of Human Services, explicitly includes Montessori observation and record-keeping techniques as approved assessment tools, and Montessori as an aligned curriculum. To secure this accommodation, the Montessori Center of Minnesota developed a formalized version of the embedded Montessori recordkeeping and observation tools, then trained teachers on the formalized process.
- **Training for QRIS assessors on Montessori Method.** A common thread across interviews, particularly from states that have not secured automatic placement or recognition accommodations, was that the assessor – the person who is responsible for inspecting the quality of a program – determines how well a program scores. Many features of the Montessori approach achieve similar goals to specific requirements in QRIS systems or classroom observational tools, but in ways that look different from typical early childhood settings. Assessors who are familiar with the Montessori model can recognize where this is the case, while an assessor without knowledge of Montessori may determine that Montessori programs do not meet specific requirements or conditions in QRIS or observational tools. According to one interviewee in Montana: “The assessors’ familiarity with Montessori program and materials varies, so the scores that programs receive varies, too.” Another interviewee in New York talked specifically about observational assessments: “[Programs] received very different scores, particularly on classroom assessments, even if they looked the same and had the same materials. Some assessors would give credit for dramatic play, for example, while others didn’t.” To address these issues, advocates work with states to train the assessors that evaluate programs for the state’s QRIS. Currently, advocates in three states – California, North Carolina, and Wisconsin – do some kind of training or education to increase assessors’ awareness of Montessori. Training assessors is the least effective accommodation because of agency or assessor turnover, but securing formal accommodations to address these issues is an arduous and lengthy process, so training is often a more viable option in the short term.

⁵ Pennsylvania is still in the process of piloting its new QRIS, though state advocates expect that it will recognize both AMI and AMS.

Teacher credential recognition

Teacher credential requirements vary across states, sectors, and age ranges – and so the degree to which these requirements affect Montessori teachers depends on those factors, as well.

In traditional K-12 public schools, regardless of the state, teachers must have a BA and some kind of state-issued license, typically obtained through the state education agency after completing a traditional, university-based preparation program or through some type of alternative certification process.

Requirements for charter schools vary more: Some states require all charter school teachers to be state-certified, others only require certification of a certain percentage of charter school teachers or those teaching certain subjects, and still others do not require charter school teachers to be certified at all. Very few states require teachers in private schools to hold a state-issued certificate, though some enforce other requirements, such as holding a BA.

At the early childhood level, the state education agency may require a state-issued teaching certificate for early childhood teachers, but that is rare. Instead, most states do not require early childhood teachers to be certified, but they do require them to meet certain minimum education requirements – such as a Child Development Associate's (CDA), AA, or BA – to work in publicly funded pre-k programs or child care centers. States may also require that teachers meet higher education requirements to reach higher levels on the state QRIS.

Taken together, we see that for the majority of public schools, some private schools, and many early childhood programs, Montessori teachers must have a state-issued credential in order to teach. But in most states, Montessori teacher preparation programs, even those accredited by the Montessori Accreditation Council for Teacher Education (MACTE), are not recognized as approved programs. As a result, to teach in a Montessori school and have a state license, teachers effectively have to go through two training programs: one that meets state requirements, and one that meets Montessori requirements. Going through two programs is an expensive, time-consuming, and duplicative venture for both teachers and Montessori programs, and severely limits the supply of qualified staff.

Ideally, states would fully recognize teaching credentials from MACTE-accredited preparation programs. At the K-12 level, this would mean that teachers with a BA and Montessori credentials would be fully qualified for a state teaching license, for use at a Montessori program, with little or no additional training required. At the early childhood level, this would mean that Montessori credentials are recognized at a sufficient level to meet all initial teaching requirements.

Only three states fully recognize credentials from MACTE-accredited programs at the K-12 level. In Montana, holders of a MACTE-accredited elementary diploma and their BA can teach in any Montana public school. South Carolina offers state Montessori licenses as a form of alternative certification.

Individuals who hold a BA and teaching certificate from a MACTE-accredited program, and pass the required Praxis exams, can receive a Montessori credential, either at the early childhood or elementary level. In Wisconsin, teachers qualify for a state license if they have credentials from a MACTE-accredited program and a BA, complete three additional credits in special education, and pass the required licensure tests.

3 states	Recognize teacher credentials from MACTE- accredited programs at the K-12 level
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Connecticut and Minnesota don't technically recognize credentials from MACTE-accredited programs, but offer similar alternatives. Connecticut has a "unique endorsement" that allows teachers to teach in a K-12 Montessori setting; to qualify, teachers need a BA, AMI credentials, and four additional courses. A recent

variance in Minnesota allows teachers with a credential from a MACTE-accredited program to receive a limited license to teach in a public Montessori program.

8
states

Recognize teacher credentials from MACTE-accredited programs at the early childhood level

Recognition of MACTE credentials is much more common at the early childhood level. Eight states fully recognize MACTE credentials. For example, Colorado has a crosswalk in place that allows teachers with a MACTE credential to teach in any early childhood program. In Florida and the District of Columbia,

MACTE credentials are recognized at the same level as the minimum required credential needed to teach, a CDA and AA respectively. Meanwhile, in New Hampshire, MACTE credentials are recognized at the three highest level of the state's career lattice, and the level a teacher achieves is based on what work experience and education level he or she has.

Ten states partially recognize MACTE credentials at the ECE level. For example, in Illinois, a teacher's credentials are ranked using a credential scoring rubric. On this rubric, Montessori credentials are recognized at levels lower than a CDA. And California recognizes MACTE credentials, but teachers in some regions of the state are still required to take 12 units of additional coursework to be fully certified.

Some states also incorporate Montessori credentials into state-approved teacher preparation programs. While many programs simply matriculate teachers who already hold Montessori credentials and award some level of credit, twelve states have preparation programs that allow teachers to earn both a Montessori credential and a state teaching license simultaneously. In Connecticut, for example, the University of Hartford has a four-year BA program through which teachers earn their degree, an AMI diploma, and a state teaching certificate. Xavier University in Ohio offers dual and triple licensure, where teachers can earn MACTE-accredited credentials, a teaching license, and a special education license all within four years. Both universities also offer Montessori Masters programs. Similarly, Montessori Northwest, a MACTE-accredited training center in Oregon, and others nationally, have partnered with Loyola University, as well as Whitman College in Washington. Through those partnerships, teachers earn their degrees, MACTE credentials, and state teaching certificates.

12
states

Have preparation programs that allow teachers to earn both a Montessori credential and a state teaching license simultaneously

Recommendations

This analysis shows three key recommendations for MPPI, state advocates, and programs to drive advocacy that leads to policy environments that are more conducive to Montessori programs.

1. State advocates should strategically develop relationships with state officials and build their understanding of Montessori

Montessori state advocates in the majority of states have already formed relationships with their state officials, but interviews suggest that those efforts can be more strategic. First, MPPI, state-level advocacy organizations, and programs should work together to articulate the pitch and requests that, if given the opportunity, advocates should message to state officials. The requests should be specific to the state and a particular policy area, and should include references to relevant policy or regulation.

Additionally, advocacy organizations should develop a strategy for engaging policymakers and disseminate that strategy among all Montessori programs in the state. State advocates should proactively reach out to and build relationships with all Montessori programs, regardless of their accreditation, certification, or validation status, to ensure that any school with "Montessori" in its name has access to the same resources and is making the same requests. To that end, MPPI should develop a system –

something as low-tech as a Google Sheet would suffice – where all state advocates must log their interactions with any key players at the state level. This step, in particular, is crucial for avoiding duplicative or conflicting messages or requests to state officials.

2. MPPI should build state advocates' capacity

To maximize the effectiveness of state advocacy organizations, MPPI should invest in building the capacity of this network of people.

The first way to build state advocates' capacity is by creating resources and providing skills advocates can use in their campaigns. For example, MPPI can develop sample messaging documents, stock request language for state policymakers based on commonly identified issues, updates and guides on policy changes, crosswalks of state quality measures with Montessori practices. MPPI should also document and highlight stories of advocates and states that implemented effective policies to eliminate barriers to Montessori – this would give advocates tools to tell stories to policymakers in their states. MPPI should complement these materials with skill building workshops, such as in-person trainings and webinars, on common areas of need such as engagement with legislative staff and interpreting policy language.

Further, MPPI should provide states with targeted technical assistance (TA). For example, MPPI may use the landscape analysis database to strategically identify gaps and the most feasible areas of improvement in a specific state's policies, then work with the state to develop a plan for addressing those gaps and connect advocates across state to share policy examples and lessons learned.

3. MPPI, state advocates, and other stakeholders should quantify the case for Montessori

Finally, MPPI and other stakeholders – including state advocates, advocacy groups, and philanthropists – should help quantify the case for Montessori education. This landscape analysis is a first step, showing the breadth of challenges using qualitative data. The questions in landscape analysis also lend themselves to myriad further inquiries that could be used to build the case for additional Montessori programs in the state.

The questions about QRIS barriers, for example, could lead to questions about parent access: How many Montessori programs in the state are not participating in QRIS because of the barriers? How many slots could those programs offer if they did participate? How many parents in that state would send their child to a Montessori school if they could? The answers to these questions begins to translate these issues for policymakers, from abstract policy challenges that only affect Montessori programs to concrete supply issues that affect constituents. Similarly, MPPI should collect and analyze existing evaluations of Montessori's effectiveness, and consider investing in impact evaluations and other studies to expand that body of evidence. MPPI could, over time, build a state-by-state database linking policy barriers to compelling quantitative data and allow advocates to pull specific data based on their needs.

Note: Prepared for the Montessori Public Policy Initiative by Bellwether Education Partners. If you have any questions about this analysis, please contact Ashley LiBetti Mitchel: ashley@bellwethereducation.org

Implications of State Policy for Montessori: Assessment Case Study from 2017 Landscape Analysis

Introduction

In early 2017, the Montessori Public Policy Initiative, with funding from the Walton Family Foundation, commissioned Bellwether Education Partners to conduct a landscape analysis of several policy areas affecting Montessori programs. (For more information on the background, methods, and findings of the landscape analysis, see the Summary of Findings document available through MPPI.) As part of this work, the Bellwether research team interviewed more than 70 advocates in 37 states to gather information about Montessori programs' experiences with required student-level assessments.

The initial hypothesis of this project was that required student-level assessments are an insurmountable barrier to authentic Montessori practice, and the only way to address that barrier is to avoid these types of assessments all together. Given that hypothesis, the primary goal of this research was to highlight states or districts where advocates had secured assessment accommodations for Montessori programs; specifically, states or districts that had secured the ideal accommodation of accepting alternative assessments in lieu of required ones.

Through the research process, however, an interesting finding emerged: Advocates have very real concerns about required student-level assessments, but at the same time see value in them. In short, the initial hypothesis was wrong.

This case study explores the relationship between Montessorians and required assessments by walking through the current state of student-level assessments and their tradeoffs and implications for Montessori programs. Ultimately, using examples from interviews with teachers and program leaders, this case study makes the argument that our initial hypothesis and the long-standing assumption behind it – that required student-level assessments are antithetical to authentic Montessori practice – are wrong.

Evolution of assumptions

Two key factors positively affect the perception of student-level assessments in the Montessori community. First, advocates suggest that circumventing student assessments is no longer their top priority. Instead, their focus has shifted to addressing more pressing barriers, like teacher credential recognition (see Summary of Findings for more information). In some cases, that's because there's a high proportion of nonpublic Montessori schools in the state, which are, in most states, exempt from state- and district-required assessments. In other cases, programs in the state haven't voiced concerns about student-level assessments. In New York, for example, the state Montessori association surveys programs about topics of concern – and assessment hasn't come up. Under both scenarios, advocates are free to turn their attention elsewhere.

The second driver of this change is a genuine shift in Montessorians' perception of student-level assessments. Many advocates are willing to tolerate required assessments for practical reasons. An advocate in Montana noted: "Montessori programs need to be able to prove that their kids can do as well as, and better than, others on assessments — otherwise they have a flimsy leg to stand on in the eyes of the field." Taking that sentiment even further, a subset of advocates strongly believe that Montessori programs should embrace student-level assessments as an already integral part of Montessori practice, and as an area where Montessori programs can meaningfully contribute to the larger conversation about student-level assessments. There are caveats, of course, about the type and quality of assessments, how the data are used, and the standards that assessments are based on, but the unexpected message from our interviews, as said by a Delaware advocate, is "Assessment is not a dirty word."

Figure 1. Assessment Framework

	Private Schools	Charter Schools	District Schools
What assessments are required?	Management organization may require assessments for internal purposes	ESSA requires all public schools to take the same statewide assessment	ESSA requires all public schools to take a statewide assessment
	State may require private schools or voucher students to take statewide assessments	State may require statewide assessments separate from ESSA Authorizer may require assessments as part of their accountability system CMO may require assessments for internal purposes	State may require statewide assessments separate from ESSA District may require assessments for internal purposes
What assessments are accepted*?	Management organization may accept an alternative assessment	State may accept other/additional assessments for some purposes (but this does not exempt schools from ESSA-required state test)	State may accept other/additional assessments for some purposes (but this does not exempt schools from ESSA-required state test)
		Authorizer or CMO may accept alternative assessments	District may accept alternative assessments
How are the assessments used?	Internal	Charter reauthorizing decisions	ESSA accountability system
	Public transparency	ESSA accountability system	
	Oversight	Public transparency	Public transparency

Current state of student-level assessments

The degree to which student-level assessments affect K-12 and early childhood Montessori programs depends on the sector, funding streams, location, and decisions within the program itself (see Figure 1).

There are three types of K-12 student-level assessments: State-required, district- or authorizer-required, internal or management organization-required. The assessments governing early childhood programs are also discussed below.

- **State-required assessments**

Starting with No Child Left Behind (NCLB) – the 2002 reauthorization of the federal Elementary and Secondary Education Act (ESEA) – all states had to assess public school students on their academic performance. The requirements were specific: Between 3rd and 8th grade, states assessed students annually on math and reading. States were also required to assess students on math and science once in high school, and on science once every grade span (grades 3-5, 6-9, and 10-12).

Before 2002, several states mandated regular student-level assessment – like Tennessee, which codified the requirement into law in 1991¹ – but NCLB set the expectation for all states. In late 2015, Congress replaced NCLB with a new federal education law, the Every Student Succeeds Act (ESSA). ESSA has the same assessment requirements as NCLB, but the law offers additional assessment flexibility that was not previously an option. The Department of Education can select up to seven states, for example, to pilot competency-based assessments. States are also permitted to use results from multiple statewide interim assessments to roll up into summative scores. Both of these options provide promising alternatives for Montessori programs.

¹ <http://addingvalue.wceruw.org/Related%20Bibliography/Articles/Sanders%20%26%20Horn.pdf>

ACCOMMODATIONS FOR DISTRICT-LEVEL ASSESSMENTS: MILLARD PUBLIC SCHOOLS

As they currently exist, state-level assessments are almost always summative: they assess student learning at a specific point in time, generally the end of the school year, by comparing student performance to a pre-defined standard. Interim assessments are more frequent; they are administered after shorter instructional timelines and measure students' progress toward learning goals. Under NCLB and ESSA, a school's low performance on state-required assessments will trigger corrective action from the state. The specific consequences depend on the state.²

Generally, private schools do not have to administer state-level assessments, though there are exceptions. Private schools in Louisiana, Wisconsin, and Indiana, for example, have to administer the statewide standardized assessments if they serve publicly funded students, such as through the state voucher or tax scholarship program.³

- **District-⁴ and authorizer-required⁵ assessments**

In addition to the assessments required under federal law, Montessori schools may have to administer assessments required by the entity that oversees them. For traditional public schools, that's the school district; for charter schools, that's their authorizer.

District-required assessments are often summative (e.g., determining how a specific school did in relation to the district overall or in relation to a specific standard) or interim (e.g., mid-year diagnostics used to determine if a specific intervention should be continued).⁶ See the sidebar on Millard Public Schools for an example of how a district recognizes Montessori programs in its assessment requirements.

Charter authorizer-required assessments are usually summative (e.g., an authorizer annually reviews performance on NWEA MAP for students in all of their portfolio schools).⁷

- **Internal or management organization-required assessments**

Millard Public Schools, a traditional public school district in southwest Omaha, offers "mini-magnets" as a way to allow parents to exercise in-district choice. Montessori schools are considered part of this program, and are also known as special programs.

Special programs are all held to the same standards and assessments as other Millard schools, but the district recognized and accommodated the unique Montessori context. For example, most Millard schools have to take content-course assessments. These interim assessments align with the district's curriculum, so students are assessed on content learned in a specific unit.

Millard accommodates Montessori schools, and other special programs in the district, on this assessment: Instead of being assessed on content that students never learned, special programs use their own assessments to measure interim content knowledge.

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² For more information, see

https://bellwethereducation.org/sites/default/files/Bellwether_ESSAReview_ExecSumm_Final.pdf

³ <http://www.ncsl.org/documents/educ/AccountabilityInPrivateSchoolChoice.pdf>

⁴ Example of [district-required assessment regime](#)

⁵ <http://ecs.force.com/mbdata/mbquestNB2?rep=CS1516>

⁶ [Interim assessments](#)

⁷ Example [PCSB](#)

Individual schools, regardless of sector, may also decide to require student-level assessments. These assessments may be summative, interim, or formative. Summative and interim assessments are generally aggregated to draw conclusions about schoolwide performance and make decisions about changes in schoolwide practice. Formative assessments, alternatively, are used by individual teachers to inform instruction. In some cases, schools will require that teachers regularly use formative assessments (e.g., early childhood programs requiring teachers to regularly record Teaching Strategies GOLD work samples), but generally formative assessments are initiated by individual teachers. Charter management organizations – the nonprofit entities that oversee the operations of two or more charter schools – may require a similar menu of assessments for charter schools.

Historically, any assessments used by a private school would come from internal interest, but there has recently been an uptick in PSMOs – private school management organizations that manage private schools in the same way that charter management organizations manage charter schools – and these may have assessment requirements.⁸

- **Assessments in early childhood programs**

Early childhood assessments are less of a challenge for Montessori programs. Unlike ESSA, there is no single federal law governing assessments in early childhood programs. Instead, different federal funding streams will have different assessment requirements that only apply to participating programs. Montessori programs that receive Head Start funding, for example, have to administer a standardized and structured assessment that allows for individualization for the child throughout the program year.⁹

At the state level, most early childhood assessment requirements are attached to specific public funding streams or QRIS – both of which are largely voluntary. Thirty-three states have child assessment requirements for programs receiving state preschool funds, and twelve states explicitly require child assessments in their QRIS, but only three – Massachusetts, Nevada, and Vermont – require child assessments as a condition of child care licensure.¹ Put another way, many states obviously consider child assessment important – they wouldn't include it in QRIS and state-funded pre-K requirements otherwise – but they also consider child assessment optional; a “nice to have” rather than a “must have” for early childhood programs. That mindset is very different than the current assessment regime in K-12, and therefore has a smaller effect on Montessori programs.

Further, commonly used early childhood assessments are less of a challenge for Montessori programs because they are similar, structurally, to Montessori's recordkeeping and observation practices. A key component of the Teaching Strategies GOLD assessment system, for example, is that teachers observe

STUDENT-LEVEL ASSESSMENTS IN EARLY CHILDHOOD: MINNESOTA

Minnesota provides a strong model for how early childhood programs can seek accommodations from student-level assessment requirements.

The Minnesota QRIS, Parent Aware, requires that 3- and 4-star programs assess all children using an approved assessment tool. Montessori trainers and advocates in Minnesota capitalized on the parallels between Montessori recordkeeping and common early childhood assessments: The Montessori Center of Minnesota refined their current practices into a formalized tool and, working in 2015 with state policymakers and agency personnel, had it added to the list of approved assessments.

Before Montessori recordkeeping was officially accepted, however, the Montessori Center of Minnesota, advocating on behalf of Montessori schools in the state, also needed to develop trainings for Montessori staff using the formalized recordkeeping tool, have the training content approved by the state, and train teachers on using the assessment. The assessment training was first accepted toward QRIS ratings in 2016.

For more information, contact Liza Davis at liza@mtcm.org.

⁸ <http://www.edchoice.org/wp-content/uploads/2015/12/2015-11-Private-School-Pioneers-WEB.pdf>

⁹ <https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/hspps-appendix.pdf>

and collect facts about what children are doing and saying. Similarly, some state-specific early childhood assessments can also be implemented in a Montessori classroom with relative ease. An advocate from Georgia, for example, noted that Work Sampling Online, the assessment required by Georgia Pre-K, is “very compatible with Montessori practice.”

Tradeoffs for Montessori programs

There is very little incentive for Montessori schools to engage with student-level assessments, particularly if they aren’t required to do so. The financial incentive that comes with public funding isn’t always enough; some schools raise thousands of dollars in additional tuition or philanthropic funding in order to avoid the requirements that come with public funding, including student-level assessments.

With or without a financial incentive, programs must grapple with a number of disadvantages if they plan on administering any of the current slate of student-level assessments:

- Assessments that focus only on reading and math, like those required under ESSA, do not measure the true quality of Montessori programs or the true performance of Montessori students.
- Assessment content and Montessori content sequencing may not align, so a student may be assessed on something they will learn the following year.
- Administering assessments takes away from instructional time.
- When used for accountability, assessments can incentivize schools to overemphasize test preparation and encourage drill-like pedagogical practices – which are antithetical to the Montessori model.

The real problem, though, is that none of the existing assessments perfectly bridge the gap between outcomes-based standards and accountability, and the Montessori model. One interviewee noted, “The ideal would be a cumulative observation documentation system that first names and then captures outcomes. That would be great. But that doesn’t exist yet.”

On the other hand, there are a number of compelling reasons why programs should consider using student-level assessments as they currently exist, however imperfect, and even if it means being held to the state’s accountability system.

First, assessment systems already exist in high-performing Montessori programs. Consistent recordkeeping and observation *is* the Montessori version of frequent student assessment, and high-performing Montessori schools can begin to translate that recordkeeping into something understood by the state. In Colorado, for example, advocates are building a body of evidence showing that recordkeeping and observation, when strategically combined with other assessments and documentation, can be rolled up into and used in lieu of traditional summative assessments. (See Minnesota sidebar on page 4 for an example from the early childhood context.)

Further, both the tests themselves and the standards informing them have evolved over time – making them now better suited to a wider range of instructional models, including child-centric models like Montessori. The tests are designed, for example, to reduce test preparation and teaching to the test: Computer adaptive tests, where the questions change depending on the student’s ability, are more common, and new assessments have more interactive question types. The new Partnership for Assessment of Readiness for College and Careers (PARCC) assessments, for example, replace the traditional 5-point multiple choice questions with questions where students must categorize answers on a pro-con rubric. Students are also required to do more writing tasks, and have to compare and contrast two different texts by answering a series of questions and writing an essay. These examples show that the standards, too, have evolved. The Common Core State Standards, for example, emphasize critical thinking, problem solving, and analytical skills, and tests now do the same: Students encounter both literature and informational texts, so test questions require them to demonstrate that they have engaged with the text in their responses.

Outside of what is strictly required, Montessori programs should consider student assessments as a tool for continuous improvement, particularly among their peers. *Montessori Partners Serving All Children* (MPSAC), for example, is a collaboration between seven Minnesota Montessori programs and the Montessori Center of Minnesota. Together they form a networked learning community that seeks to build a body of evidence demonstrating the effectiveness of the Montessori model for all income levels, races, and cultures. To that end, MPSAC took on a three-year evaluation to measure progress in school structures and quality; children’s academic, cognitive, social, and physical health; and successful inclusion and support of parents and community. The evaluation used five assessment tools to measure progress on these focus areas: a Teacher Effectiveness Rubric, the Work Sampling System, the Bracken Basic Concept Scale, the Family Knowledge Systems Survey, and the Community Knowledge Systems Survey. This evaluation is a substantial – and somewhat costly – step toward building a strong body of program evidence, but other programs can take on similar work in smaller scale or more informal structures.

Finally, Montessori programs should consider pursuing student-level assessments for political expedience. There are very real risks if a program – or the Montessori community as a whole – is perceived as trying to skirt accountability, or ignoring equity, effectiveness, or transparency. At the same time, the existing assessments are very far from perfect. As one advocate said, “It’s a balance. We can’t look anti-assessment, but we need some kind of progress because the current assessments don’t make sense for Montessori programs.” Put another way, one advocate noted: “Going against assessments because of ‘authentic Montessori practice’ is like cutting off your nose to spite your face. We live in a data-driven society, and testing is a necessary skill. Montessori programs need the data to show that we keep up.”

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