

THE HISTORY OF MONTESSORI EDUCATION  
IN AMERICA 1909-2005

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by  
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## ABSTRACT

Dr. Maria Montessori was the first woman in Italy to receive a medical degree. While working with handicapped children, she developed educational methods that allowed them to pass national proficiency tests. With this success, she then generalized her techniques to other young children, and the method came to be known as the Montessori Method of education. This paper addresses the history of the Method's arrival and implementation in America, and the future outlook of the Method in the public sector given recent educational trends. Using the historical research method, material was compiled, verified, organized, and synthesized from hundreds of primary and secondary sources to create a coherent depiction of the Montessori movement in America from 1912 until 2005.

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#### APPROVAL OF THE DISSERTATION

This dissertation, "The History of Montessori Education in America 1909-2004", has been approved by the Graduate Faculty of the Curry School of Education for the degree of Doctor of Education.

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## INTRODUCTION

When she was 23 years old, my German grandmother, Maria Schopke, decided to become a teacher. While no one remembers exactly what drew my grandmother to Maria Montessori's training in Berlin in 1926, we all know that she was wholly committed to the Method and remained a Montessorian all of her life until she retired at age 70 in 1972.

In 1928, with her Montessori training completed, my grandmother took a job as a teacher in the *Montessori Schule in der Kaiserallee* in Aachen, Germany where she taught children ages four through eight. There she befriended the man who would come to be my mother's godfather, Peter Goesgnes, also trained by Maria Montessori. That same year my father Carl, his twin brother Fred, and their sister were enrolled in the same Montessori School. Their mother was on the board of the school, and a supporter of Dr. Montessori's innovative work with children.

My father recalls that the reason his mother had decided to enroll her children in the private Montessori school was that the German public schools were heavily steeped in the Catholic tradition, and my father's family was Jewish. His cousins also attended the school. This new Montessori school enrolled a proportionately higher number of Jewish children, but in all, the school was filled with children from well-off and well-educated families. My father, Uncle Fred, and their cousins were enrolled there from age five until age nine; my grandmother and Peter Goesgnes were their teachers.

In 1933 my grandfather, Dr. Herman Schopke, a professor of physics and mechanical engineering, moved to Düsseldorf with my grandmother and their daughter, Ursula, my mother, an infant not yet a year old. It was not until 1936, after my uncle Klaus was born, that my grandmother resumed teaching in Berlin where she opened a Montessori classroom for children ages 6-9 in a public school because Hitler had outlawed private schools by that time. Hitler had his own pedagogy and eventually closed down this classroom and any others that did not further his political agenda.

In late 1944, my grandmother opened up a one-room school in Berlin for children who walked in the door: those in desperate need of schooling due to the devastating effects of the war. My grandmother was able to provide her young pupils lessons using handmade Montessori materials crafted by my grandfather. My family still has those 60-year-old materials, including multiplication boards, matching cards made of wood, and handmade booklets for reading and writing.

In 1949, my grandfather took up an academic appointment as a professor of Physics at the University of Köln. My grandmother taught elementary-aged children in a private Montessori school there from 1950 until 1967. In 1967, she took a job at a state-run Montessori school working exclusively with children deemed unable to perform in mainstream schools – those with Down Syndrome, or with physical and emotional difficulties. It was in this school that I visited during the summers. My grandmother offered me candy to work in a Montessori classroom helping the children with lessons, even a little money if I read German

books to them. I was under ten at the time and quite happy to be paid for my teaching work.

I remember visiting our important family friend Peter Goesgens, who, in his 70s, was also still teaching elementary-aged children in the Montessori school in Aachen. He caught up with my grandmother and my mother while we visited his classroom, and I recall that all of the children kept working while he entertained us with a kaffé. When my grandmother died, and when Peter Goesgens died, both of them had spent their entire adult lives teaching using the Montessori Method. My grandfather, Dr. Herman Schopke, probably made more Montessori materials than any man alive. He even made my grandmother elaborate necklaces during the war out of the glass beads from the multiplication bead chains – necklaces that my sister and I still own.

My mother attended Montessori school through her childhood until the war when she was sent to boarding school while my grandmother and grandfather secretly helped transport Jewish children to England. In 1950 at age 18, my mother enrolled in teachers' college, the Pedagogish Academy in Aachen, Germany where she encountered two of Montessori's disciples, Helenae Helming and Kate Fisher. She took the Montessori training from them at a time when Germany still had many children not enrolled in school and when teachers were in dire need. In 1951 my mother attended Mario Montessori's teacher training workshops in Kent, England. It was there that she made her Montessori "albums," which are the foundation of any Montessori teacher's pedagogy. We

recently found my mother's albums from these courses, all in German, when we cleaned out our collection of antique Montessori materials.

During her enrollment in teachers' college, my mother taught in a Montessori school while serving as the school's English teacher. She graduated with a German public school diploma specializing in Montessori education.

On February 22, 1940, my father landed in New York City with his parents. Over the years in America his family remained and worked in New York City, eventually purchasing land, owning a farm, and all the while, his mother sending care packages of clothes and food to the Schopkes, my mother's family in Germany. My father told me that his mother knew that the Schopkes were not Nazis and had suffered as had many Germans both during and well after the war.

In 1955, after serving as a ranking officer in the American military, and graduating from Temple University as captain of the debate team and as an outstanding student, my father visited Germany again. Some of his responsibilities on that trip were to call on the family lawyer who was working with Jewish families on the reparations after the war and to visit the Dr. Schopke and Maria in person to see how they were now faring in Germany. When he arrived at the Schopke's home, my grandmother Maria suggested that he introduce himself and finally meet my mother in Aachen where she was taking her Montessori training. (When I asked my father, "So, this was the first time that you ever met mom?" "No, no," he responded. "I met her for the first time when she was just 10 days old. Frau Schopke invited all of us to tiptoe up the stairs to the apartment

above the classroom to see her new tiny baby, Ulli, in her crib. That was the first time I met your mother, but I do not believe that I left much of an impression.”)

Because my own mother had plans to visit America, my grandmother and grandfather wanted her to know someone when she arrived. My father continued his vacation in Europe by visiting family friends in Aachen and, in the event that my father would not take initiative to contact my mother, my grandmother Maria called my mother and told her to go visit the Lempkes where Carl was staying. This turned out to be good parental nagging. My mother went to visit the Lempkes and my father took her out on a date to the theatre. A year later when my mother traveled to America to take a job as the governess to the Agriculture attaché for the German embassy, my father was at the pier in New York to meet her with the required affidavit from him. In 1957 my parents married in Washington D.C.

My mother had four children between 1958 and 1964 and did not find this eventful. “I didn’t do anything really until 1968,” she told me. It was then that she became a Montessori teacher in Wisconsin for one year at the Garden Gate Montessori School. When we moved to Greenwich, Connecticut, she became a Montessori teacher at the Whitby School in 1970 where she taught elementary-aged children in a classroom for 6-9 year olds until 2001.

My own schooling occurred at Whitby where I arrived in second grade to what I considered to be a classroom oasis. On my first day of school, I learned to write my name in cursive and perform dynamic addition. My memory of my school years at Whitby through the 8<sup>th</sup> grade were marked by a series of

experiences that had little to do with academic learning and more to do with my love of recess and the afternoon classes. I recall music classes where we learned to play elaborate pieces on the Orff instruments and sing songs in parts while we played those instruments. We performed beautifully and were called upon to play in churches and old-age homes - my first experiences in community service. While I loved the many hours I spent in the music room, I also loved French because of the French plays that we performed several times a year. To this day, some 33 years later, I remember many of my lines and parts in those plays. In art I learned the craft of Batik, candle making, pottery, sculpture, and printmaking. I spent years and years in the art room, in all of my spare time and even sometimes after school. In carpentry, I made my own lucky baseball bat, and in gymnastics, I learned how to dance. I recall quite fondly the Wednesday Mass that was held every week at 11:00am before we were all dismissed for a half day of school. Moreover, there was Mike, the gentle golden retriever, who wandered over to the school during the day to help us eat our sandwiches when the weather permitted outdoor lunch.

It was known in Greenwich that Whitby became the first private school in New England to enroll Black families; I attended school with the children of Henry Belafonte and Sydney Poitier who, along with many white families, made their living in the performing arts in New York City. Yet it was shortly after Martin Luther King was shot, that the families at Whitby decided to integrate the school in a sincere way and provided scholarships and their own homes as foster

homes to impoverished children from Harlem, New York, most of whom graduated with me eight years later.

Whitby was a school marked by its uniqueness in many areas. It was the first Montessori school in America, and there was a great deal of enthusiasm for its unique pedagogy. It was an integrated school, and it was a school that enrolled families of extraordinary wealth – in fact, cousins of the Kennedys founded the school. It was also a small school where boundaries between students were unconventional but natural.

I remember the junior high girls coming into my classroom weekly to read with us as part of their community service. Having endured the *Adventures of Toad and Frog*, they would return to the junior high. Before heading off however, they would ask us what we had in our lunchboxes. I packed my lunches double on the evenings before the junior high girls came to read, wanting desperately to win approval by offering a scooter pie to my tutor.

I wrote reports with an audience in mind. In second grade (my first year and the only year I recall my academic work) I prepared an elaborate report on the lobster with diagrams of the body parts and pages on the reproductive system. I visited my sister's classroom in the Casa dei Bambini, read my report, and explained repeatedly how the lobster mates and lays the eggs. Today I still have sympathy for the lobster, and while I will eat any shrimp, the lobster remains sacred to me. We were permitted to go and visit other classrooms for special reasons, but I visited my brothers in the upper school just to say hello, which was never as satisfying as the sheer walk alone down the hall. All of this

was an exercise in independence toward confidence, something I suspect my teacher intuited.

While the academic portion of my life as a child went by entirely unnoticed by me, imparting the academic material to children was something of paramount importance in my mother's life. My mother participated in Montessori workshops at Whitby, usually as a mathematics presenter. As I got older, I heard the lectures and the keynote speakers, helped make the materials, babysat for attendee's children, and even acted as the demo student trained to respond to the cards and materials presented by the aspiring teachers as they practiced. Most everyone who came to our home was affiliated with Montessori schooling, and when Whitby hosted any workshops, the speakers and presenters slept in our house. There was a fuss on these many weekends, and I always liked it during Montessori workshop time because it meant that we would have guests and fun and dessert after dinner.

When I was 24 I too decided to become a teacher. I was not partial to Montessori schooling, in fact, I was quite happy to move away from the Method. My parent's home, though always tidy and reflective of foreign travel, art, music, and books, was also a veritable school itself with materials everywhere. In every nook and cranny of my home were dresses made from bark, 5-foot replicas of Egyptian mummies, old wasp's nests, dinosaur footprints in 50-pound slabs of stone, elaborate garments from Iran which were used as the costumes for the three kings, and mineral specimens neatly arranged in egg cartons lined with black velvet. I swore that I would not allow my own interests to become

tyrannized by the keen desire of a Montessori teacher to bring every stirring fact to the eyes of a 6-year old.

I earned my certification and Master's Degree in Elementary Education, and during my student teaching I was assigned a position as a second grade teacher in a traditional public school. Here was a kind and gentle teacher and eager children, and yet I as the student teacher was constantly searching for something to do, something to hold, move, or manipulate – some material to offer the children besides the requisite worksheet after worksheet. I started to make materials, and I even made simple reading books out of magazines. I reproduced the number chains with colored Lego blocks. Somehow, expelling information through lecture, and asking the young children to transfer information from a chalkboard to the paper in front of them, was inefficient. They consistently seemed to “drop the ball” as they moved to apply the information from the board to the worksheet at hand. Furthermore, not all of the children were ready to work on the lessons assigned from the teacher's manual, while other children finished the task in the first two minutes of the unit. This disparity of aptitude and work speed, coupled with a grading procedure in which I had to give six-year old children “grades” on the assignments sincerely completed was heartbreaking to me and defied my idea of common sense. Happily, I had a mentor teacher who allowed me to impart academic concepts to her children in any manner that I saw fit. Her seniority, experience, and confidence permitted me to work as creatively as I could. I will always remember what she wrote to me after I left, “Wow. How

we miss you.” This mentor allowed me to advance in my own self-construction as a teacher.

As a result of these experiences, I began to consider Montessori training. I even applied for Montessori training, but in the interest of avoiding impulsivity, I let the idea ripen some more.

Ultimately, my decision to become a Montessori teacher was made by my mother and father. In June, I pulled up in the driveway, fresh out of graduate school, unemployed and happy to spend the summer at the beach. I was shocked when they told me to leave my bags in the car because I was going to Washington to commence my Montessori training at the Washington Montessori Training Institute – I had been accepted. That was in 1987. After that I spent a year teaching the Casa dei Bambini children, ages 3-6, in New York City. It was in that year that I was offered a part-time job in an Episcopal church to establish the Atrium program, a specialized religious curriculum designed by Sophia Cavaletti, a friend and collaborator of Maria Montessori. So, while I taught children in New York, I also took the Atrium training intermittently over four years.

Montessori training for elementary-aged children must be completed separately from the Casa training. I dreaded my decision to embark upon it in 1989 knowing the tedium that lay before me of the composition of the new albums, and remembering that Camillo Grazzini, Mario Montessori’s protégé, trainer and the most definitive authority over the AMI along with Renilde Montessori, had given me a B on a section of my oral exam concerning the practice of folding cloth napkins. I was not a natural, but I went and took the first

AMI summer elementary training in Cleveland, Ohio. Some of my classmates told me during the first days of training that they too would like to earn both AMI diplomas. They had no idea how difficult these next summers would be.

I will admit that Montessori training remains the most unpleasant academic experience of my life, due to its staggering monotony, allegiance to infinitesimal detail, and perverse insistence that students *make* classroom materials in an age when all of these booklets, charts, and cards can be manufactured. Yet, I am loyal to the AMI, and I pay for and send aspiring teachers in my own school to their training centers because the instruction and resulting albums (curriculum) is standardized.

I taught in the Yonkers Public School system in a Montessori school for six years, earning my Master's degree at Columbia University in Private School Leadership as well as a diploma from the Orton Society of Dyslexia. Instead of moving ahead for my doctorate at Columbia, I moved to Virginia where parking tickets were only \$20. At the University of Virginia, I began work on my Educational Doctorate in School Administration and Policy.

My brothers and sisters have all sent their children to Montessori schools. All of my closest friends send and have sent their children to Montessori schools – with varying degrees of success albeit, but my influence and my sincere belief that Montessori pedagogy is the most humane and intellectual form of education leads them to these schools.

Today I am the Headmistress of a Montessori school. I walked into this job as a neophyte and was struck when I first heard someone say to me that the

decision to add a music program replete with Orff, string orchestra, choir, Latin and African drumming, and cultural dance was “not Montessori.” Also, establishing art in the curriculum, and sports and foreign languages, was “not Montessori.” Encouraging faculty to purchase materials from a variety of school catalogues that were not Montessori catalogues was seen as profanation and evidenced my clear lack of insight and knowledge of the Montessori Method. Most demoralizing however, was that my loyalty to true Montessori pedagogy was in question and that the depth (or lack of depth) of this loyalty was, quite erroneously, linked to my competence as an organizational leader.

Among Montessori educators, there is still much discussion and debate over what is “Montessori.” I first approached the topic of the History of Montessori in America to determine the roots of the debate. I assumed that by carefully tracing the history of the Method, I would find some definitive truth. What I have learned over these years of reading, writing, and interviewing is that there simply is no definitive “Montessori,” although many people do think there is. My own Montessori experience, while rooted in the Method actually taught by Maria Montessori herself to my grandmother, also reflects the vision of the pioneer educator and founder of the American Montessori Society, Nancy Rambusch, who brought the movement back to America and integrated it into the American educational landscape. Her brainchild, Whitby Montessori School, was the very school that Mario Montessori rejected as not “pure” and therefore not Montessori. Paradoxically, Whitby became the largest and most famous of Montessori schools, the paradigm for both private and public Montessori schools nationwide.

I am so fortunate to have such vivid experiences in both of these worlds – the world of the emergent Montessori Method in Europe through the work of my grandmother and my own mother, and the emergent Montessori Method in America, my own schooling at Whitby, and now running a Montessori school using elements of both worlds. Today, when someone tells me that something “is not Montessori,” I respond by saying, “Well, it depends on your view of history.”

## THE GENESIS OF DR. MONTESSORI'S METHOD

Maria Montessori was born on August 31, 1870 in the town of Chiaravalle, in the province of Ancona, Italy, the only child of Alessandro and Renilde Stoppani Montessori. At the age of three, the Montessori family moved to Rome where Maria attended a local state-run public school (Association Montessori Internationale [AMI], 1970). According to later writings, Montessori's early educational experiences were miserable, and she showed little intellectual aptitude (Smart, 1970). At the age of 12, she persuaded her parents to reject the state school for girls and instead enroll her at Rome's all-male technical engineering school. Maria survived the inevitable harassment as the only woman in a male establishment and graduated with a firm grounding in mathematics and engineering.

After completing this technical school education, Montessori's parents encouraged her to become a teacher, the sole profession open to women, but Montessori decided to become a physician. Women were not permitted to attend medical school, so on her own Maria made an appointment with Dr. Guido Bacelli, Minister of Education in Rome. "He informed her pleasantly but firmly that she could not enroll in the medical school. She informed him equally pleasantly while shaking hands as she left, 'I shall study medicine'" (AMI, 1970, p. 9). In defiance of even stronger prejudice than she had previously faced, Maria Montessori enrolled in the University of Rome as a medical student, and in 1896,

she graduated at the top of her class with the first medical degree ever awarded to a woman in Italy (Smart, 1970).

Upon graduation, Montessori decided to specialize in nervous and mental disorders and received her first appointment in the Psychiatric Clinic of the University of Rome. Her duties took her into the city's asylums to study cases and select patients for treatment. Here, she encountered mentally disabled children who were institutionalized together with the severely mentally ill. She was deeply troubled by the fact that young children with limitations such as deafness, paralysis, rickets, and retardation, were placed in bleak asylums, in lieu of any other suitable shelter, where they lived day after day utterly without activity and were abandoned as hopeless (Montessori, 1912). Her contact with these children increased and she found herself in disagreement with the generally accepted views about how best to treat them. As the children under her care began to make progress, Montessori concluded that mental deficiency was an educational rather than a medical problem (Montessori, 1912).

Convinced that all children could be educated to some degree, Montessori read the works of the great 19<sup>th</sup> century French doctors, Jean Itard and Eduard Seguin, who had made substantial progress with deaf and mentally disabled students in France. Maria Montessori expounded on this research in 1898 during an address to 3,000 members of the first congress of the *Associazione Pedagogica Italiana* meeting in Turin. Guido Baccelli, Minister of Education, was impressed by her ideas and appointed her director of the newly established *Scuola Ortofrenica* in Rome, a position she held from 1898 until 1900. She

recruited children deemed as “hopelessly defective” from elementary schools and “insane asylums” throughout Rome to enroll in her school (Montessori, 1912). For two years, she skillfully and imaginatively combined her own ideas with those of Itard and Seguin, and developed her own pedagogical materials to support her theories. This combination ultimately brought her remarkable success in teaching these children to read and write (Montessori, 1912). After two years, Montessori registered her “deficient” children to take the State Examination in reading and writing skills. They took these tests alongside school children of normal intelligence, and her students passed the tests, in some cases scoring higher than non-handicapped children (Montessori, 1912).

While this achievement brought Montessori a modest measure of notice and fame, she then became deeply troubled that the children of normal intelligence attending public schools were doing so poorly on academic examinations. Montessori (1912) wrote:

While everyone was admiring the progress of my idiots, I was searching for the reasons which could keep the happy healthy children of the common schools on so low a plane that they could be equaled in tests of intelligence by my unfortunate pupils! (p. 39)

The more deeply she thought about it, the more Montessori (1912) became convinced that her newly-designed Method contained educational principles more rational and effective than those generally in use in the public schools. She wrote:

I felt that the Methods which I had used had in them nothing peculiarly limited to the instruction of idiots. I believed that they contained educational principles *more rational* than those in use, so much more so, indeed, that through their means an inferior mentality would be able to grow and develop. This feeling, so deep as to be in the nature of an intuition, became my controlling idea after I had left the school for deficient, and, little by little, I became convinced that similar Methods applied to normal children would develop or set free their personality in a marvelous and surprising way. (p. 33)

In 1906, while Montessori was still at work developing her Method for mentally disabled children, a broader experiment in tenement house reform was taking place in the slum district of San Lorenzo in Rome. San Lorenzo at that time propagated all of the evils of humankind: spectacles of extreme brutality, murder, vice, violence, child labor, overcrowding, sexual trade, and organized and petty crime (Cohen, 1968). The buildings were decaying and crumbling, and it was common for up to 20 people to live in two rooms with no light, heat, or running water. In San Lorenzo, one could see the effects of the isolation of the masses of the poor, and when Montessori (1912) received her first tour of the area she wrote:

It was as if I found myself in a city upon which some great disaster had fallen...these were the homes of misery and blackest poverty.... Whoever enters, for the first time, one of these apartments is astonished and horrified.... We enter here a world of shadows, and that which strikes us

first is the darkness which, even though it be midday, makes it impossible to distinguish any of the details in the room.... In speaking of the children born in these places, even the conventional expressions must be changed, for they do not "first see the light of day" they come into a world of gloom. (p. 51-52)

In 1906, the *Istituto Romani di Beni Stabili*, Rome's most important real-estate company, with the backing of the Bank of Italy and the municipal government, inaugurated an audacious housing reform program, which led to the full renovation of the notorious slums of San Lorenzo. Thus, the once overcrowded, deteriorated, unsanitary hovels were remodeled to admit light and air. Interior buildings were torn down to create large courtyards adorned with grass and flowers. Each family was given its own one or two-room apartment with a kitchen, electric lighting, and independent water supply. There were central lounges for reading and social gatherings, and the government granted one month's free rent at the end of the year to all of the tenants who took good care of their apartments (Cohen, 1968). Thus, a blighted area was reformed, and neat new buildings were created in their place. The pressing problem that remained for the owners of these apartments was what to do with all of the children under six years old who were left unattended during the workday (AMI, 1970).

At the time of the industrial era, children between the ages of two and seven who were too young for the public schools were often left unattended during the day while the parents worked. Unsupervised, undisciplined, and given

no activity at all, these children caused considerable damage to the interiors of the buildings and the gardens outside (AMI, 1970). The community decided to gather all of the children together and confine them into rooms on the ground floor where adults were charged to keep them quiet and inactive during the day in order to prevent the damage to the facility (Smart, 1970). Montessori was approached and offered governance of one of these rooms, which she readily accepted as a laboratory for her emergent Method (Smart, 1970). It was only weeks after beginning her work with these children that she was given responsibility for all of the children in all of the tenement houses. Shortly after the inception of that project Montessori (1912) wrote:

A great opportunity came to me.... It was Signor Talamo's happy idea to gather together in a large room all the little ones between the ages of three and seven belonging to the families living in the tenement. The play and work of these children was to be carried on under the guidance of a teacher who should have her own apartment in the tenement house. It was intended that every house should have its school.... we should soon be able to open 16 of these "schools within the house." (p. 43)

Under the given name of *Casa dei Bambini*, or the Children's House, Dr. Montessori opened her first school on January 6, 1907 (Montessori, 1912). In a paper entitled *Educating the Urban Poor*, Professor Sol Cohen (1968) encapsulated the social ideas behind Montessori's first *Casa dei Bambini* citing Montessori's virtually unknown book *Pedagogical Anthropology*, which has never been translated from Italian to English. He wrote that Montessori, alone among

educators of her day, recognized that children were not all equally ready for school when the time came to begin. She also isolated several social factors, especially in the children of the poor, which led to school failure. The children of San Lorenzo, cut off from beneficent influences, “born into a world of gloom... to grow among the poisonous shadows which envelop overcrowded humanity,” stagnated in a miasma of ignorance and poverty until the time when their age qualified them for the public school (Cohen, 1968, p. 65). However, even once in school, Montessori, through her many observations in state schools for normal children, noticed that the deficiencies of their environment left them unprepared to profit from what the schools had to offer (Montessori, 1912). Unlike their more advantaged peers, she saw that they inevitably fell further and further behind. The impoverished environment they lived in held them at its own low level, and thus prevented them from making progress. It was exactly this intellectual deficiency of the poor, brought on by their impoverished environments, that Montessori believed could be remedied and reversed by schooling children at a very young age (Montessori, 1912).

According to Cohen, Montessori also believed that the lack of social skills among children of the poor, such as the lack of grace, poise, and manners--the heritage of more fortunate children--made them less attractive in comparison and therefore more viable targets for discrimination (Cohen, 1968). Free public education was theoretically democratic, but the children of the poor were, in reality, at a severe disadvantage. Maria Montessori likened public education of children of the varying social classes to an unequal duel between a man with a

long arm and a man with a short arm. In Cohen's (1968) translation of her first book *Pedagogical Anthropology*, Montessori wrote:

Accordingly, physical beauty constitutes in itself a class privilege. This child, weak in mind and in muscular force, when compared with the child of wealth, growing up in a favorable environment, shows less attractive manners, because he has been reared in an atmosphere of social inferiority, and in school is classed as a pariah. Less good looking and less refined, he fails to enlist the sympathy which the teacher so readily concedes to the courteous manners of more fortunate children; less intelligent himself, and unable to look for help from parents who, more than likely, are illiterate, he fails to obtain the encouragement of praise and high credit marks that are lavished upon stronger children who have no need of being encouraged. Thus it happens that the downtrodden in society are also the downtrodden of the school. And we call this justice; and we say that the demerit is punished and merit is rewarded; but in this way we make ourselves the sycophants of nature and social error, and not the administrators of justice and education. (p. 68)

Given this marked disparity, Montessori began her work by designing a program of education that would compensate impoverished children for the shortcomings of their homes and neighborhoods. Convinced that these children were neither being cared for properly nor learning what they should at home, Montessori designed the little school in the housing project as the kind of home to which the resident poor would do well to aspire. Making it their school by

giving them collective ownership, she modeled it on a version of home that many of them did not know (Mayer, 1964).

Montessori's original plan attempted to remedy the defects of development of the children of San Lorenzo, so that they could compare favorably to the beautiful children of the privileged classes when they entered school (Cohen, 1968). Montessori focused on creating a system of education for children ages two through six, the developmental years before children typically entered school, to focus on all elements of the child's development that would be subject to prejudice in public school by teachers and others in the more fortunate social classes. Her mission, as she saw it, was the intellectual and social elevation of the poor through early schooling.

Montessori's Method of education was initially centered on four areas of curriculum: exercises of practical life, motor education, language training, and sensory education. The most critical lessons of practical life were concerned with the care of the child's own person, with care of the environment, and with lessons in social courtesy. They were designed to promote cleanliness, order, poise and conversation. The beginning of the school day was organized around the lessons of practical life. Montessori (1912) wrote how these manifest in the classroom:

As soon as the children arrive at school we make an inspection for cleanliness. We examine the hands, the nails, the neck, the ears, the face, the teeth; and care is given to the tidiness of the hair. If any of the garments are torn or soiled or ripped, if the buttons are lacking, or if the shoes are not clean, we call the attention of the child to this. In this way,

the children become accustomed to observing themselves and take an interest in their own appearance. (p. 122)

This daily observation was critical to Dr. Montessori because the most obvious difference between disadvantaged children and more fortunate children was their outward appearance. Her Method placed an emphasis on teaching young children, before school age, to properly care for themselves physically so that once they entered public school at age seven, they would no longer stand out as poor (Montessori, 1912). Montessori (1912) explained how she trained children:

In the class, however, the teacher, by using a little washstand with small pitchers and basins, teaches the children to take a partial bath: for example, they learn how to wash their hands and clean their nails. Indeed, sometimes we teach them how to take a foot-bath. They are shown especially how to wash their ears and eyes with great care. They are taught to brush their teeth and rinse their mouths carefully. (p. 122)

Once children had attended and cared for themselves, the lessons in the Montessori classroom turned to the care of the classroom environment. The children put on little aprons to inspect the room to see whether the classroom materials were in order and clean. The teacher showed them how to use various objects necessary to clean a room: dust cloths, dust brushes, child-sized brooms and mops, all of which the children used by themselves. Children learned how to appropriately set a table, serve a meal, use a knife and fork, and peel fruit. They were taught how to greet adults politely, enter a room and sit appropriately with

the correct posture, handle delicate objects, receive objects politely, and blow their noses in a polite manner. All of these skills contributed to the child's poise and equilibrium, and thus minimized the obvious outward differences of public behavior between children in differing social classes (Montessori, 1912).

Each of these exercises in practical life was also developed to aid the child in motor education. The lessons were formally presented, and the child shown exactly how to do each task, not just in any way, but in an orderly, exact, and effective way. To wash a table, for example, he was shown a series of steps to follow that would give him satisfaction and success: putting on an apron, arranging the pail, soap and sponge, rubbing the sponge across the table in long, even strokes, rinsing, cleaning up, and finally returning materials to their proper places. These exercises of practical life focused on the process, the means rather than the ends--the importance of performing an action in a logical sequence in order to avoid confusion, and unnecessary expenditure of energy. Montessori gave tiny children this lesson in opening a door: "(1) approach the door, (2) raise the arm and (3) turn the handle, (4) pull the door a *little* way out, (5) let the handle go back, (6) pull the door well out" (DeVries & Kohlberg, 1987, p. 271). This is what Montessori would refer to as the "analysis of movement," designed to bring better coordination between mind and muscle and again, to teach children to move with intention (DeVries & Kohlberg, 1987, p. 271).

Through these practical life exercises, children in Montessori's school were also made aware of the necessity of good health and social habits and learned how to meet these requirements by themselves. These simple

procedures, obvious as they seemed, were in great measure intended to undermine the disparity between the San Lorenzo children and the privileged children whose environment and upbringing had already educated them in the constituents of socially acceptable appearance, manners, and personal hygiene (Cohen, 1968).

While Montessori utilized gymnastics, games, and short exercises to help the child to move with poise, she also radically altered the classroom environment to provide as many opportunities for the child to practice the control necessary for appropriate movement. Montessori designed and had manufactured child-sized tables and chairs, washstands, and cupboards. These radical reforms in the appearance of a school classroom were not so much intended for the enhanced aesthetic appearance of the classroom or exclusively for the comfort of the children, but rather for the increased learning experiences that they made possible to the child (Cohen, 1968). Child-sized furniture, and pedagogical materials designed for the child to use autonomously, gave children access to their surroundings so that they could function independently. To Montessori, freedom did not consist of having others at one's command to perform ordinary services, but in being able to do things for one's self. Montessori believed that a carefully prepared environment that enabled children to act independently brought out the natural tendencies inherent in all children to master their own environments and to learn and perfect skills (Rusk, 1954).

Linguistic stimulation and good language were also specifically addressed in Montessori's school. In an effort to close the gap of differences between

children of the poor and those who are well off, she believed that the child needed to speak in such a way that he or she could assimilate into polite society (Cohen, 1968). She wrote, "If one considers the charm of human speech, one is bound to acknowledge the inferiority of one who does not possess a correct spoken language" (Montessori, 1912, p. 323).

Montessori worked with children on vocabulary development and articulation in three distinct ways: formal morning conversations, *verbal gymnastics*, and Seguin's three-period lesson.<sup>1</sup> These distinct lessons were designed to teach children exact and precisely articulated nomenclature and pronunciation, which enhanced correctness and fluency of speech. Montessori believed that sophisticated language development was essential for successful school performance later while also allowing children of the poor to have greater access into previously inaccessible social realms. The foundation of her Method was her belief that very young children could learn and understand sophisticated and refined language because it was between the ages of two and five that children were in what she perceived as the strongest phase of language acquisition (Montessori, 1912).

Montessori emphasized conversation as a teaching tool and, using group and individual conversations, teachers facilitated an unfolding of language, both

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<sup>1</sup> Montessori accepts from Seguin the division of the lesson into three stages or steps: (1) the association of the sensory precept with the name. For example, the child is shown two colors, red and blue. When the red is presented, the teacher says simply, "This is red," when the blue is presented, "This is blue." (2) The second period or step involves recognition of the object when the name is given. Thus, the teacher says to the child, "Give me the red," "Give me the blue." (3) The third step involves recalling the name corresponding with the object. Thus the child is asked as the object is shown, "What is this?" and he responds, "Red" or "Blue." Recall, as ordinary experience abundantly exemplifies, is more difficult than recognition (Rusk, 1954).

technical and social. In 1912, Montessori wrote about appropriate topics for conversation in public as well as imparting to the child areas that should be avoided:

...the directress can prevent the children from recounting happenings in the house or in the neighborhood, and can select, instead, topics which are adapted to pleasant conversation, and in this way can teach the children those things which it is desirable to talk about; that is, things with which we occupy ourselves in life, public events, or things which have happened in the different houses, perhaps, to the children themselves – as baptism, birthday parties, any of which may serve for occasional conversation. (p. 124)

These daily conversations, and the Seguin lesson plan for imparting vocabulary, served as the basis for linguistic education.

Another major component of Montessori's Method was her sensory education, which she imparted using didactic apparatus. This material, known as the *sensorial material*, used hands-on lessons to refine the five senses, primarily because she believed that the children of San Lorenzo were most sharply handicapped by intellectual under-stimulation at home (Montessori, 1912). Influenced by Itard and Seguin's accounts of sensory development, and Rousseau's belief that in isolating the senses one could strengthen them, Montessori reasoned that it would be possible to educate the child's sensory mechanism, his awareness of touch, sight, smell, hearing, and even taste, as a

way to prepare him for a more refined observation of the environment, which in turn would help to develop his intelligence (Cohen, 1968).

Using continual exercises of observation, comparison, and judgment, the child's sensory mechanisms were developed. This was important because Montessori insisted that the development of the senses preceded superior intellectual activity, and children between three and seven years of age were in a period of intellectual formation (Montessori, 1912). In an effort to train the child's five senses, Montessori developed her own materials, which were designed to isolate the use of one sense at a time, while also being self-correcting. These materials aided in the discrimination of size, shape, color, sound, and tactile feel. For example, for perception of size she developed a series of wooden cylinders varying in height only, in diameter only or in both dimensions at once. She designed blocks that varied regularly in size, and rods of regularly graded lengths for the children to arrange. For perception of form, geometric insets were made in metal and wood and also drawn on cards. The children traced them to bring the form into the memory through the large muscles while also matching them visually. For discrimination of weight she made identical tablets in wood that were similar in size but differing in weight for the child to arrange from heaviest to lightest. For touch, she created small tablets with surfaces that ranged from a highly polished surface to a sandpaper surface. For sense of temperature, she filled metal cylinders with water from hot, tepid, or freezing. For exercises in auditory acuity, she made cylindrical sound boxes containing different substances so the children could match the sounds and later grade them from

loudest to softest. For the visual sense she introduced the color tablets, so that children could match colors and then grade individual shades from darkest to lightest (Montessori, 1912).

The materials were designed so that initial lessons were simple and highlighted a few strongly contrasting images. For example, Montessori described the process of teaching *hot* and *cold* to a three-year-old child by blindfolding the child in a quiet place and drawing his hand over a dry rubber bag filled with water at 60 degrees Celsius and 10 degrees Celsius. The teacher simply says, "It is hot. It is cold," and the lesson would be finished (DeVries & Kohlberg, 1987). Lessons then move from a few strongly contrasting images to finely differentiated stimuli, and subsequent exercises became increasingly demanding. For example, for the student who had acquired an extraordinary ability in differentiating finely graded stimuli, for instance, visual perception of color, there were exercises that required the sorting and grading of 64 color tablets (Montessori, 1912).

Montessori's many sensorial materials allowed her to introduce an abundance of compensatory stimuli into the classroom, while naturally allowing children to see a task and a problem to its final conclusion. The materials also allowed Montessori to individualize instruction to an unprecedented degree. In fact, the didactic material enabled Montessori to revolutionize the whole teaching/learning environment. The most significant feature of the Montessori system was, and remains, the individualization of instruction. The whole paradigm shifted away from a teacher-centered classroom (Rusk, 1954).

These *Casa dei Bambini* differed radically from other classrooms. In fact, Montessori (1912) detested the schools of her day:

...where the children are repressed in the spontaneous statement of their personality till they are almost like dead beings.... restricted by those instruments so degrading to the body and spirit, the desk – and material prizes and punishments. Our aim in all this is to reduce them to the discipline of immobility and silence - to lead them - where? Far too often toward no definite end. (p. 26)

Montessori abolished the use of grades, punishments, and rewards. Typical large group instruction was abandoned and children were permitted to work indoors or go outside. This freedom was not without limits. Rules and protocol were set by the collective interests, and behavior of the children was determined by what was considered right and proper within the educated classes. The role of the teacher in Montessori's school also looked much different from the traditional role of teacher at that time, and this was possible because the materials Montessori created allowed children to be quite independent from adults. Montessori (1912) wrote:

...little children reveal *profound individual differences* which call for very different kinds of help from the teacher. Some of them require almost no intervention on her part, while others demand actual *teaching*. It is necessary therefore, that the teaching shall be rigorously guided by the principle of limiting to the greatest possible point the active intervention of the educator. (p. 96)

Montessori's original plan was to remedy the grosser defects of development in the San Lorenzo children, so that when they entered school they would compare favorably with the children of the privileged classes. However, circumstances ultimately persuaded her to teach academic concepts as well. Initially, when she began her work with the very young children, Montessori shared the common prejudice at the time to avoid teaching children academic subjects such as reading and writing until the age of six (Montessori, 1912). However, the children's rapid progress, their own desire to learn how to read and write, and their mothers' concerns about their adjustment to a highly formal Italian educational system caused Montessori to reconsider her position. She embraced the opportunity to give these unfortunate children a head start on the kinds of material that they would be learning in the public schools (Rusk, 1954).

One of the unforeseen outcomes of using the sensorial didactic material, designed to refine the senses, was that children became better prepared for academic tasks. For example, young children were asked to make subtle discriminations in geometric forms by matching wooden geometric shapes with the drawn figures on a card. This kind of practice, in which children discriminated forms from one another, each bearing only the slightest difference, helped them discern the difference between the written letters, even those that looked alike such as *l* and *f*, or *m* and *n* when written in script. Many of the sensorial exercises trained the children in coordination and in the movements necessary for writing. When the pencil was finally placed in their hands, children exploded into writing (Montessori, 1912).

The Bells, which were designed to develop the child's discrimination of subtle pitch differences, prepared children to readily discern the difference between even the most subtle letter sounds as *b*, *p*, *d*, and *q*. Daily formal conversations with the teacher in which children learned the correct pronunciations of words provided the basis for correct writing through phonemic analysis of spoken language (DeVries & Kohlberg, 1987). The Montessori child first learned the sounds rather than the names of alphabetic signs and spelled words as he sounded them out. Thus, Montessori observed that children in the Montessori classroom actually wrote, or composed words, before they could fuse the letters and read. After time, children learned to compose words using the letter symbols of sounds, which led them to decode phonetic words with greater and greater ease and familiarity, which in turn, led to their reading at age four and a half (Montessori, 1912).

Montessori developed many materials for children to learn the skills of reading, writing, and mathematics, and soon it was clear that they were leaping ahead academically. Montessori observed that in her schools the average child began to write at the age of four, and that by five years of age, knew how to read and write and perform simple mathematic operations (Rusk, 1954). Additionally, they were able to care for themselves, converse, and behave in such a way that it was nearly impossible to recognize that the children of San Lorenzo, the notorious slum in the heart of Italy's capital, were from the most unfortunate backgrounds (Montessori, 1954).

It was not long before professors from Harvard, Columbia, and the University of Chicago, hearing of the pioneering education offered by Montessori in the slums, visited these schools and saw that by relying on permissive guidance rather than on discipline, children were able to reach their highest potential, so far an outcome unseen in the United States. A feature article written by Josephine Tozier (1911) in McClure's Magazine reveals:

Dr. Montessori had been able to teach three year olds how to read, write, and thirst for more. The most conspicuous of Maria Montessori's triumphs is that of teaching quite young children, without putting the smallest strain upon their faculties, first to write and then to read. (p. 19)

## AMERICAN EDUCATIONAL BACKGROUND IN THE 19TH AND 20TH CENTURIES

America before World War I was marked by a diversity of educational experiments and pedagogical luminaries, including: Edward Thorndike, who led the field of educational psychology; Patty Smith Hall, kindergarten reformer; John Dewey, progressive education leader; and William Kilpatrick, disciple and interpreter of Dewey, and Columbia University's most renowned and sought after faculty member--"the million-dollar professor," (Urban & Wagoner, 1996). The educational arena was unsettled and changing rapidly. It was into this turmoil and growth, and among these influential educators, that Maria Montessori entered the educational scene in America.

The practice of schooling two, three, and four-year-olds was not new in America in 1900. Indeed, two, three, and four-year-old children attended school in the 19<sup>th</sup> century whenever circumstances required care outside the home. In 1890, New York City alone had an estimated 200,000 children under the age of five, the majority of whom were poor. The result was the appearance of day nurseries organized by churches and charitable organizations. These nurseries were primarily concerned with the physical well being of their charges: children were fed, bathed, and kept safe from the streets. These nurseries typically operated 12 hours a day, six days a week. Most personnel lacked training and even resorted to cruel methods to control the children (Unger, 1996).

The 20<sup>th</sup> century however, saw a new belief that education in the family was better than institutional training for young children. In 1909, President Theodore Roosevelt told the Conference of the Care of Dependent Children that they should help widowed mothers remain at home with their children. The conference ended with this resolution, "Home life is the highest and finest product of civilization. It is the great molding force of mind and character. Children should not be deprived of it except for urgent and compelling reasons," (Unger, 1996). This resolution prompted 48 states to enact laws providing widowed mothers with pensions in order to stay home with their children, rather than being forced to work outside of the home. The spread of these mother's pensions dramatically increased the number of mothers who stayed home with their children, while the resolution also influenced married mothers to care for children in their own homes. The result of the dictum, and the pension, was the dissolution of the day care nursery in entirety by 1918 (Unger, 1996).

At the same time that custodial nursery schools were rapidly disappearing, psychologist and Clark University's founding president, G. Stanley Hall published his treatise, *The Contents of Children's Minds on Entering School*, which fueled the Child Study movement. Hall's goal was to develop a science of child development, and influence schools for young children toward becoming pedocentric rather than scholocentric: that is, adapting the schools to the young children, rather than insisting that the young child conform to adult standards and mores. Hall's theory was premised upon the idea that each human being must pass through all stages of human evolutionary growth in order to reach maturity.

He held that children were fundamentally different from adults in their behavior and interests, and schools should not interfere with the natural development of the child through punishments and constraints. Instead, children were to be protected from harm, shown love, and nurtured in their natural propensities. Hall, and those in the Child Study movement, criticized the rigidity of the existent school system, with its rote-learning, narrow curriculum, grading system, and lack of furniture, materials, and equipment appropriate for young children (Weber, 1970). The Child Study movement gained momentum and recognition throughout the 1890s and into the early 1900s (Urban & Wagoner, 1996).

The Child Study movement, which emphasized child observation and research, led to the creation of private nursery schools, which could supplement the child's home experience, while also acting as laboratories for teachers and researchers to observe the behavior and preferences of children. One such school, which later prompted the formation of many other schools in the United States, was formed in 1916 by a group of "faculty wives" at the University of Chicago (Forest, 1927). These educated parents wanted to create environments to supplement home learning, while also allowing social contact and group play. The educational character of the undertaking was carefully stressed, and the stated object of the Chicago nursery school was to promote the permanent and useful development of little children (Forest, 1927).

The activities in early educational nursery schools always included a research component. Forest (1927) wrote:

The physiological testing and study of children is given a great deal of attention in many of the nursery schools. Various types of record keeping are used; personality studies and diary records are made in certain centers in an attempt to get as accurate a picture as possible of the characteristics of individual children.

The educative activities provided for children in the first and subsequent educative nursery schools were very much like the progressive kindergartens also gaining popularity at the same time. Toys for indoor and outdoor play were provided in great variety. Music and informal rhythmic activities were also included in the curricula of all nursery schools (Forest, 1927). The aim of the educational nursery school was thus twofold; first, it was used as a laboratory of sorts, in which all children were routinely observed and studied. The second purpose was to create and promote an environment in which children could be educated in a manner where they could be themselves, free from the cruelty of adult pressure toward conformity. The number of private nursery schools in the United States rose steadily from 1915 onwards, though the growth and acceptance remained slow. The building of the American school system began not at the bottom, with the work of the youngest children, but at the top. The value of educating the youngest children in society was not fully recognized and had yet to win its way into American society (Urban & Wagoner, 1996).

Kindergarten originated in Germany in 1837 when Friedrich Froebel discovered that children seemed to learn more from play than from strict, formal, direct instruction and rote memorization. He developed a theory of education that

allowed children to grow and learn naturally by playing games, singing, listening to absorbing stories and using selected work materials to engender creativity. This concept spread throughout Europe, but proved of little interest to Americans until the 1870s and 1880s (Ross, 1976).

During the first phase of the kindergarten in the United States, from 1870 to 1890, kindergarten teachers were required to follow Froebel's precise system and to rely on his *Mutter und Kose Lieder* for subject matter. This work was the bible of early kindergartners and contained stories and activities based on the needs and environment of early 19<sup>th</sup> century rural Germany. However, by 1890, a growing number of educators had chosen to operate under the premise that Froebel had devised the kindergarten in order to illustrate his general educational ideas, and that for teachers to duplicate all aspects of his program was antithetical to Froebel's spirit and his real intentions. Many argued that since Froebel had utilized the philosophical and psychological theories available in his day, he no doubt would have welcomed the opportunity to criticize and reevaluate his program on the basis of new knowledge in his fields (Ross, 1976).

Opposing these reformers, there remained those who did not accept any tampering with Froebel's system, led by Susan Blow, the "Pope" of the kindergarten system, who refuted criticisms of their pedagogy. Hence, from 1892 until 1920, bitter battles raged among personalities and ideologies within the kindergarten movement, especially among the faculty of Teachers College at Columbia University, and in the newly formed International Kindergarten Union (Ross, 1976).

In addition to massive philosophical and pedagogical debates concerning early childhood educational instruction, there were significant trends in state legislatures concerning education, most notably, the passing of compulsory attendance laws. By 1890, 27 states had passed such laws, and by 1918 all 48 states then in the union had enacted such legislation. The passage of these laws was attended by tremendous political strife among Americans. Political support for the compulsory attendance laws came primarily from those in the middle and upper classes, who feared urban children roaming the streets without the benefit of family supervision. Child labor opponents also favored compulsory school laws, so children would no longer be subject to such dangers as working in anthracite coal mines, cotton mills, or slaughter houses. Compulsory attendance opponents came first from those who objected to the principle of government compulsion in any area, and then from those such as urban poor and farmers who depended on the proceeds from their children's work to help them survive and prosper (Urban & Wagoner, 1996).

It was into this era of growth and controversy in the field of early childhood education that Maria Montessori arrived. As a woman and a foreigner, she was not part of the emergent American educational picture. In fact, she was met with distrust and skepticism. Yet, her unique educational Method immediately captured American interest because it fostered independence and intellectual training, traits highly valued in American educational philosophy. Ironically, the role of Montessori's Method in promoting social equity, and education for the poor, was ignored or misunderstood. Instead, her Method was favored for its

intellectual curriculum, and became most popular among the wealthiest Americans: the social and political elite.

Henry W. Holmes (1912), professor of English and educational reformer from Harvard University, wrote of Montessori and her work:

It is wholly within the bounds of safe judgment to call Dr. Montessori's work remarkable, novel and important. It is remarkable, if for no other reason, because it represents the constructive effort of a woman. We have no other example of an educational system – original at least in its systematic wholeness and in its practical application – worked out and inaugurated by the feminine mind and hand. It is remarkable also because it springs from a combination of womanly sympathy and intuition, broad social outlook, scientific training, intensive and long considered study of educational problems, and, to crown all, varied and unusual experience as a teacher and educational leader. No other woman who has dealt with Dr. Montessori's problem - the education of young children - has brought to it personal resources so richly diverse as hers...certain aspects of the system are in themselves striking and significant: it adapts to the education of normal children methods and apparatus originally used for deficient; it is based on a radical conception of liberty for the pupil; it entails a highly formal training of separate sensory, motor and mental capacities; and it leads to rapid, easy and substantial mastery of the elements of reading, writing and arithmetic.

Holmes continued to describe the very effective means by which Maria Montessori had taught children, much younger than age six, to learn academic tasks that were once deemed only within the intellectual reach of 8-year olds. He believed that the American schools could improve on their own instruction if they adopted some of the lessons invented by Dr. Montessori, especially those lessons in the academic subjects once reserved for older children. Holmes (1912) wrote, "There can be no doubt that Dr. Montessori has devised a peculiarly successful scheme for teaching children to write, an effective method for the introduction of reading, and good material for early number work...for uniting and dividing." He pointed out that the children in Montessori's classrooms were learning to read and write, and that educators should concede that even the conservative kindergartens in the United States were not teaching children to write or read. He continued:

...there has been a fairly general conviction that writing is not in any case important before the age of eight or nine. In view of Dr. Montessori's success in teaching children of four or five to write with ease and skill, must we not revise our estimate of the value of writing and our procedure in teaching it? What changes may we profitably introduce in our teaching of reading?

The idea that children could begin to learn at such a young age began a shift in and questioning of the prevailing educational paradigm. Children who were very young could learn, children once deemed hopeless due to their disabilities could learn, and children who were impoverished, if given the right

environment, could also attain academic success--all of this while when commencing upon their tasks, even to the untrained adult observer, with a joyful, unforced, and exultant spirit.

Yet what enamored Americans most from the very start was that Dr. Montessori's materials could impart academic knowledge and skills to very young children. Creating social democracy and a more level playing field between the privileged and the poor was never touted as cause for celebration or a reason to adopt the Method in the United States. In the many newspaper and magazine articles featuring Montessori's work with children, it was the academic accomplishments of children, and the relative ease, freedom, and obvious ambition with which they did so that excited the interest in Montessori schooling in America. Dr. Montessori's original goal was never to make students of the infants, but to enable underprivileged students to enter school and experience the same success as their privileged peers. However, this humanitarian goal was overshadowed and ultimately lost when the Method entered the American educational arena. In America, the fervor over her Method was based primarily on the fact that very young children were showing remarkable academic accomplishment. The prevailing thinking in education in America in 1912 was that children under the age of six could not really learn academic concepts or perform complicated operations. Here was proof, and a method, that showed otherwise.

Maria Montessori's work was first introduced in America through a series of five articles written in 1909 and 1910 by Jenny B. Merrill, Ph.D., in *The*

*Kindergarten-Primary Magazine*. Unlike the progressive kindergartens in the United States that stressed play, Merrill wrote that the Montessori Method focused on reading, writing, and mathematics as the curriculum for the very young. Merrill, as found in Applebaum (1979), wrote:

It did seem that we had succeeded in cutting out the three R's, but Dr.

Montessori has put them back in the infant school in Rome and we must convince our Italian friends of the error or let them convince us.

Merrill's articles, written in the midst of the kindergarten controversy, called for readers to be "liberal...not dogmatic," and to read about the Method with unbiased interest (Applebaum, 1971). Merrill contended that, though controversial, the new Montessori Method deserved critical examination, and in her final article, Merrill encouraged kindergarten teachers to make an effort to visit the Montessori schools in Italy (Applebaum, 1971).

Merrill's articles were written for professionals in the field of education, and while her articles are credited with being the first introduction of Montessori's work to the United States, it was S. S. McClure, founder of *McClure's Magazine*, who was responsible for introducing the Montessori Method to mainstream America. S. S. McClure never imagined that the public would be interested in an article about early childhood pedagogy. In fact, in his autobiography he remembered that no one in his office actually believed that an article about the Montessori Method would evoke any attention or interest at all. Yet McClure, on the suggestion of one of his writers stationed in Rome, commissioned Miss Josephine Tozier who had spent some time in Rome talking to Montessori and

visiting her schools, to write an article (Cather, 1997). The ensuing article described Montessori's influences, and when and how her Children's Houses were formed.

Before the article was published, McClure submitted it to several American authorities on kindergarten and early childhood pedagogy. In McClure's autobiography, Cather (1997) recaptures McClure's experience:

These experts, I found, greatly differed in their estimates of Montessori's methods. Some of them were very antagonistic in their attitude, and declared that, because Mme. Montessori recognized and valued the great educators of the past, there was nothing new about her methods.

Despite these detractors, there was a massive public response to McClure's first article about Dr. Montessori and her Method. The Method immediately intrigued not only the populace, but also many scholars and prominent intellectuals. In Cather's (1997) autobiography of McClure's, McClure has recalled that: "Alexander Graham Bell... best known as the inventor of the telephone, told me that he considered the introduction of the Montessori system in the United States as the most important work that McClure's Magazine had ever done."

Following the printing of Tozier's article in May 1911, letters of inquiry began pouring into the office in such numbers that the magazine staff declared it impossible to answer them all. In Rome, Maria Montessori also found herself engulfed in letters from Americans (Cather, 1997). Few magazine articles had ever attracted such widespread and spontaneous interest; in just a few weeks,

her name had reached practically every part of the western world. The press in the United States, and in every country in Europe, reprinted the article in whole or in part, and letters continued to flow into McClure's office by the thousands, even months after the initial publication (Cather, 1997).

The primary interest of the public rested in the article's assertion that by relying on permissive guidance, rather than on discipline, Dr. Montessori had been able to teach three-year olds how to read, write, and thirst for more complex academic learning. Tozier (1911) wrote, "The most conspicuous of Maria Montessori's triumphs is that of teaching quite young children, without putting the smallest strain upon their faculties, first to write and then to read."

In pedagogical, political, and social circles, the Method had clearly stirred up a storm (George, 1912). Montessori's *The Montessori Method*, which is the English translation of *Il Metodo della Pedagogia Scientifica applicato all'Educazione infantile nelle Case dei Bambini*, appeared on American booksellers shelves in April 1912, and 5,000 of the first edition copies sold out in four days. In view of the great and increasing interest, the editors of McClure's decided to publish a regular monthly Montessori article regarding the progress of the movement and more information and discussion about the Method (George, 1912).

McClure himself was quick to capitalize on the popularity of the Montessori Method. He knew that Dr. Montessori had films showing small children engaged in academic tasks, such as learning to read by manipulating alphabetic apparatus. By obtaining the North American rights to these motion

pictures, McClure had the basis for a fine lecture series, and so, McClure traveled to Rome in the fall of 1913 to broach and subsequently settle the deal of a lecture series featuring Dr. Montessori herself. The plan was that Montessori would come to the United States with him, and that they would go on a joint tour of the biggest cities, beginning in New York, then onto Washington, Philadelphia, Boston, and Chicago (Lyon, 1963).

Dr. Montessori, grateful for the attention given to her work in McClure's Magazine, was immediately won over by McClure's enthusiasm and ambitious plans. He spoke of establishing the Montessori Educational Society, which would establish Montessori schools throughout the United States, training schools for teachers of the Method, and even forming a company that would manufacture the didactic apparatus in America. He told Montessori that because of this tour, she could, by virtue of her Method, revolutionize the entire system of primary education in the United States. According to Maria Montessori, McClure was a rich and powerful protector who could do no wrong. He was, she told him, strong and chivalrous, "comme la personne sans tache et sans peur," and she agreed to tour the United States with him (Lyon, 1963).

Montessori's arrival in America in 1913 was no small occurrence. By that time, there were already 70 established Montessori schools in the United States, all using teachers Dr. Montessori had trained herself in Rome, thousands of books sold, and close to 100 articles written about her and her Method. Major newspapers followed her lecture tours in great detail. The December 4, 1913 issue of the New York Times marked her arrival:

The most interesting woman in Europe arrived upon these shores yesterday. Dr. Maria Montessori has not only made her house of childhood a virtual factor in Italian education, the spirit of her practice has spread far and wide and promises to leave a permanent mark upon the training of children everywhere... Americans will give Dr. Montessori a particularly hearty welcome. Her theories of individuality, of permitting each child to develop freely and without restraint, have an exceptional appeal in this free-for-all-country. As someone has said: 'America is a Montessori nation to start with.'

On December 7, 1913, just days after her arrival in the United States, Mr. and Mrs. Alexander Graham Bell hosted a reception for Montessori in Washington D.C. After the reception and formal dinner, Montessori gave her lecture to hundreds of guests who gathered for first-hand information about her unique and remarkable work with children. The Washington Post (December 7, 1913) reported in an article entitled, "Entertain Dr. Montessori:"

Mr. and Mrs. Alexander Graham Bell entertained at a reception this evening complimentary to Dr. Maria Montessori, when 400 members of Washington society met the noted Italian educator... Among the guests listed in attendance at the reception were Margaret Wilson, daughter of the president of the United States who was known to be deeply committed to Montessori's work, the Secretary of the Interior, the Commissioner of Education, the French, German and Italian ambassadors, the Norwegian Minister, the Ministers from both Uruguay and Peru, as well as the

secretaries of Navy and Commerce, as well as numerous foreign dignitaries and Washington's social elite. All were interested in meeting Montessori and hearing her speak about her pioneering Method of education with young children.

On December 9, 1913, Montessori presented her lecture in New York City's Carnegie Hall, and by accounts in the New York Times and the New York Tribune, Montessori's visit and address were exceptionally popular. The Times reported that tickets to the lecture were sold out within an hour, and that more than 1,000 persons were turned away, unable to get seats for the lecture. An article in The New York Tribune entitled "Montessori Race" (1913) reported:

There was not an empty seat in Carnegie Hall last night when Dottressa Montessori gave her first lecture in New York upon the educational system she founded. In the galleries there were rows of people four and five deep, standing. The lecture lasted nearly three hours, including the time when S. S. McClure was introducing the greatest woman educator in history and the time when moving pictures of the children in the Montessori school were being shown upon a screen.... Professor John Dewey of, Columbia, presided over the meeting.

Representatives of the progressive educational establishment sharing the stage with Montessori included Patty Smith Hill of Columbia University, Henry Fairfield Osborn, president of the American Museum of Natural History, Frederick A Stokes, Montessori's American publisher, and James H. Balliett, Dean of the School of Pedagogy at New York University. Well-respected academics flanked

her at every turn, and the intellectual, social, and political elite broadly embraced her message.

In fact, from the very beginning of the Method's introduction in America, most of Montessori's support came from political elite and educational progressives. Frank Herbert Palmer (1914), editor of *Education*, wrote that he saw much of Madame Montessori's message being received by the "upper or middle class mother, with one child and one or more maids." Additionally, the first Montessori teachers in America were themselves from the upper classes, characterized by Cohen (1969) as "one of those well-born, well-educated, troubled young women which the Western world threw up in such large numbers at the turn of the century." They traveled to Rome to take the only available training in the Method, given by Dr. Montessori herself.

For the several years following her tour, the outburst of enthusiasm for the Montessori Method continued to spread across the United States. Women sponsored by wealthy patrons who were interested in the Method for their own children, and those interested in educational reform, continued to enroll in Montessori's training course in Rome. Her international training course in Rome had 45 American students enrolled from February 23 to June 30, 1914, even though she did not announce plans to offer the course until mid-December (Applebaum, 1971).

The Montessori Method in America died out almost as quickly as it started. At the height of the Method's popularity in 1916, there were 104 Montessori schools in 22 states (Applebaum, 1971). By the mid 1920s however, scarcely a

trace of Montessori remained in America. There were a number of reasons for the demise, and it is difficult to determine which event weighed most in the eventual downfall. It appears that all of the following problems created a cascading effect wherein all dilemmas originating separately came together and overwhelmed the movement, ending its momentum and demand in this country.

The first educational problems occurred right away, when Montessori confronted the turmoil already brewing in the American kindergarten. In 1905, Susan Blow, the conservative who promoted strict adherence to the Froebelian kindergarten, and Patty Smith Hill, who lectured on the newer methods in kindergartening, had locked horns on the faculty of Columbia University. Their conflict epitomized the larger conflict between the conservatives and liberals in the arena of early childhood education, the latter wanting to break away and bring the original practice of Froebel's kindergarten up to date, while the former clung to Froebel's kindergarten pedagogy as the only truth for the instruction of small children. These two opposing, and heavily invested groups, could not relocate their educational practices and ideas to support Montessori's pedagogy. The liberals saw it as too inflexible, because Dr. Montessori insisted on training her own pupils using the pedagogical materials she designed. The conservatives were yet clinging to their own guru, Froebel, and were not likely, at least at that time, to switch their loyalty to Montessori. The conservatives rejected anything new, while the liberals, who were willing to explore many possibilities, were not willing to exchange one set of dogma for another (Rambusch, 1968).

Another obstacle to the integration of the Montessori Method in America included the difficult access to Montessori training. Despite the many American students who took her training in Rome, no one in the United States was ever able to set up a training course that Dr. Montessori would recognize. The only training course she saw as valid was her own in Rome. She also was unwilling to let anyone adapt or amplify her Method (Cohen, 1969). The [American] Montessori Educational Association, founded by Mabel Bell in 1913, with a membership of over 100 Americans, attempted to convince Montessori to return to America to give a training course on American soil. However, Montessori's relationship with S. S. McClure had taken a bad turn by April 1914 over a sum of money, and she insisted that all of her ties and contracts with him, such as lecture and film rights, be cancelled. Furthermore, she insisted that if a training school for Montessori teachers were to be established in America, only she would be organizing the class (Applebaum, 1971).

In one final attempt to persuade Dr. Montessori to come to America on behalf of Mabel Bell and the members of the American Montessori Educational Association, Gilbert H. Grosvenor, son-in-law of Mrs. Bell, visited Dr. Montessori in Italy to ask her to come to America to offer additional training and a lecture tour to the many members interested in her work. At that time Grosvenor, editor of *National Geographic* and quite influential himself, found Dr. Montessori unyielding. Applebaum (1971) stated that he wrote to his mother-in-law:

It is going to be very difficult to have any business dealings with a woman of her peculiar disposition... She seems to me to lack the faculty of

knowing who her friends are. We all know Mr. McClure's weaknesses, but I think his promotion of Madame Montessori and her ideas was entirely altruistic. She owes her entire success to him, and yet because she thought he ought to have sent her \$100 more than he actually did send, she writes him a most insulting letter and discontinues all dealings with him.... My own hope is that if Montessori comes to America you will retire as President of the Association. You gave the Association the benefit of your name and experience and financial help at a time when it sorely needed it. But this situation will be very different when Montessori reaches America, and I am afraid there may be unpleasantness. Anyway you would be worried to death over her idiosyncrasies and her utter lack of responsibility.

In 1914, Dr. Montessori did make a contract to establish a Montessori training center in New York City, and chose Miss Helen Parkhurst to run the center in her absence, while handpicking two teachers whom she deemed fit to give the demonstration classes. For reasons that are unclear, the contract was later torn up, and Parkhurst, with the other trainers, had their diplomas revoked by Dr. Montessori. This pattern of establishing training centers, and then closing them down, became characteristic of Dr. Montessori, who could not tolerate the idea that her Method would be taught by anyone but herself, or be altered in any way. If she so much as suspected that others would impart a fraction of the pedagogical system without her advance approval, she would close the training

facility, revoke the diplomas of their students and de-authorize them (Cohen, 1969).

In the end, those who had the means to support Montessori and sponsor her trips to the United States were the very people she snubbed and alienated. She remained very anxious about the misuses of her name and the purity of her Method. She insisted that no school or society could assume the name of Montessori without authorization (Cohen, 1969). Because she insisted that no one could be called a Montessori teacher unless she had personally trained the teacher, American teachers had to travel abroad to learn her Method. At the onset of World War I, travel abroad became impossible, and the steady flow of Americans traveling to Europe for Montessori's training ended abruptly. Additionally, Italian fascism further dampened American enthusiasm for the Italian educator and her work (Rambusch, 1963).

There is also the widely held belief that William Heard Kilpatrick's book, *The Montessori System Examined*, weighed heavily in the decline of the Montessori Method in the United States. William Heard Kilpatrick, who experienced a meteoric rise in popularity after he arrived as professor at Columbia University in 1911, received national attention as an educational leader of the first rank. He was charismatic by all accounts, inspirational and even gripping in his manner of lecture and his message. According to biographer John A. Beineke (1998), there was not a graduate student, teacher, administrator in New York who would not have leapt at the opportunity to hear Kilpatrick providing his insightful critiques of educational thinkers. His influence went so far that in

1916 alone he received invitations to speak from 18 states and was later known as the “million dollar professor,” alluding to the revenue that his lectures and courses brought into Teachers College at Columbia University (Beineke, 1998). Thus, it would remain an understatement to assert that Kilpatrick’s support or lack thereof would have an impact on Maria Montessori’s reception from educators in the United States. From the start, it appears that Kilpatrick looked upon Dr. Montessori’s methods and materials with wry skepticism referring to her educational plan in America as “an unorthodox scheme” (Beineke, 1998).

In the spring of 1912, Kilpatrick, along with a group of colleagues, sailed to Italy to gain firsthand observations of Montessori schools and to meet Maria Montessori herself. On June 4, after having visited several Montessori schools in Rome and noting that “the children seemed free; free almost to the point of doing nothing at times,” Kilpatrick and his group met with Maria Montessori but the meeting did not go well (Beineke, 1998). Kilpatrick pressed Montessori about her apparatus and wanted to know who represented her financial interests in the United States. He conveyed astonishment about her lack of knowledge on the issues of formal discipline as well as her beliefs on memory, reasoning, and sensory discrimination. Then, after some time, apparently, something went wrong with the interpreter and Montessori abruptly ended the interview. According to Beineke (1998), Kilpatrick suspected that someone “had tried to queer our visit.”

After the short engagement with Montessori, Kilpatrick and his group visited several more Montessori’s schools, learning more about the Method through their own observations than from Dr. Montessori herself. Upon returning

to America, Kilpatrick set about to offer lectures both inside and outside of Teachers College about what he had observed from her Method. After delivering the first of many lectures on Montessori's work on August 7, 1912 in a packed Horace Mann Auditorium, Kilpatrick wrote, "there was a good crowd and they gave excellent attention... I felt that I gripped the crowd and from the number of expressions that came to my ears, I judge that I made a good talk," (Beineke, 1998).

While the popular press and many important public figures were exalting Montessori's work, Kilpatrick was an unsympathetic critic. He spent extensive time denouncing her ideas through lectures and later delivered a 71-page manuscript entitled *The Montessori System Examined*, which he published in 1914. Kilpatrick claimed that Montessori's educational views had been created through unscientific observation and note taking and that her knowledge of educational thought and practice revealed her clear lack of knowledge. Kilpatrick (1914) wrote in this paper:

While Madam Montessori's interest in the scientific attitude is entirely praiseworthy, her actual science cannot be so highly commended. Her biology is not always above reproach...she generalizes unscientifically as to the condition of contemporary educational thought and practice from observation limited... If she had known more of what was being thought and done elsewhere, her discussions would have been saved some blemishes and her system some serious omissions.

In this paper, which was written to appraise the worth of the Montessori system in American education, Kilpatrick seemed not only to attack the work, but even at times the woman herself. While intellectually gifted, Kilpatrick's own schooling was not nearly as rigorous and intellectual as Dr. Montessori's. Upon entering graduate school at Johns Hopkins University, he had trouble holding his own and scored a zero on his first mathematics exam. In fact, Kilpatrick's entire undergraduate education was questioned by his professors and considered mediocre at best. His graduate studies did not include the study of biology, though this did not keep him from asserting that Montessori's understanding of biology was highly flawed (Beineke, 1998). Kilpatrick, known to be fiercely competitive and deeply motivated by his newfound recognition and prominence at Teachers College and elsewhere, may have been motivated against Montessori, in some part, by his own heavy burden of envy brought on by the recognition and financial returns that her materials and lectures were bringing.

Kilpatrick commended Montessori on her ideas of child liberty and discipline, but harshly criticized Montessori's concept of child development referring to it as "inadequate and misleading" (Kilpatrick, 1914). He insisted that the "three R's" should not be taught before age six and that her teaching of arithmetic has little or no use in America (Kilpatrick, 1914). He was troubled by the lack of group work and group instruction in the Montessori schools observing, "the Montessori child, each at his own chosen tasks, works, in relative isolation, his nearest neighbors possibly looking on...We criticize Montessori...that she

does not provide situations for more adequate social cooperation” (Kilpatrick, 1914).

Further adding to his unease of her work was the fact that Montessori discouraged play of all kind in her classrooms and insisted that her self-correcting academic materials be used only for the intent in which they were designed. This kind of firm delineation troubled the progressive experimentalist Kilpatrick. While he was earnestly interested in the Practical Life activities, writing that they “offer expression to a side of child nature too often left unsatisfied,” and that “To do something that counts in real life, not simply in the play world, is frequently one of the keenest pleasures to a child,” he held that the rest of Montessori’s materials with their self-correcting features were too rigorous and closed (Kilpatrick, 1914).

Kilpatrick asserted that Montessori’s didactic materials, while strongly attractive and compelling to children, were very remote from the social interests and connections to anything relevant in the child’s life. He wrote:

...in these schools *playing* with the didactic apparatus is strictly forbidden, and usually no other play material is furnished. Madam Montessori has, in fact, been publicly quoted as saying, ‘If I were persuaded that children needed to play, I would provide the proper apparatus; but I am not so persuaded.’ The best current thought and practice in America would make constructive and imitative play, socially conditioned, the foundation and principal constituent of the program for children of the kindergarten age, but Madam Montessori rejects it.

Kilpatrick further pointed out that Montessori did not use games in her classrooms like the games found in American kindergartens. He wrote that the forms of self expression such as drawing and modeling were “on the whole inferior to what we have here” and that a lack of drama, stories, or free play, and very “inferior” painting coupled with a distinct and prescribed use of materials, led to a curriculum that was inadequate by virtue of its limitation of opportunity and undue restrictive design (Kilpatrick, 1914). He believed:

Such a limitation of opportunity is, in effect, nothing less than repression, a repression destructive alike of happiness and mental growth. Moreover, since expression is the means to the acquisition of the culture of the race, the deficiency in expression is serious, whether it is looked at from the point of view of the child and his present happiness and growth, or from the point of view of the culture and the preparation for participation therein. From every consideration, the curriculum proves inadequate.

Kilpatrick was not alone however in his pointed criticism of Montessori. Only weeks before Kilpatrick embarked on his lecture series castigating the Method, Edward Thorndike had also come out against Maria Montessori’s concept of sensory education, and in the preface to the 1914 manuscript Kilpatrick credited John Dewey for reading his composition and submitting important suggestions (Beineke, 1998). This kind of implicit endorsement and support from premier educational heavyweights at Columbia University Teachers College clearly lent his booklet additional credibility in the minds of American educators.

Ultimately, Maria Montessori herself was instrumental in the collapse of her own movement in America during this period. As controversy began to erode the popularity of the Method, Montessori made one final trip to America in 1915 and never returned after that. The Montessori educational movement went into hibernation until 1958.

## HISTORY OF THE MONTESSORI MOVEMENT IN AMERICA 1958-1974

Upon her departure from America in 1915, Maria Montessori left her training center in New York City under the direction of one of her very first American pupils, Helen Parkhurst, (who was soon to be banished for her work in the center), and with an ultimately empty promise to return. After withdrawing her support from S.S. McClure, who brought her Method to America's attention through the media, she broke off her association with the Montessori Educational Society he had founded; the once fervent members disbanded (Applebaum, 1971).

Though Montessori schooling was nonexistent in the United States for over 40 years, it continued to flourish in Europe and Asia, and in 1950, Dr. Maria Montessori was nominated for the Nobel Prize (Chattin-McNichols, 1992; Standing, 1957). When she died in 1952, major newspapers throughout the world carried her obituary. It was not until 1958 that Montessori education surfaced onto the American educational scene once again and Americans were receptive to the pedagogy for a host of reasons.

First were the widely publicized research findings from prominent psychologists as Jean Piaget, David Elkind, O. K. Moore, and Jerome Bruner. These luminaries stood in agreement with Montessori's original insights some 40 years before, asserting that children had a remarkable learning capacity at a very young age, and that given the proper learning materials they could not only enhance their own knowledge and skills, but also alter and boost their

intelligence (Chattin-McNichols, 1992). Of her work, Professor Jean Piaget (1970), who was also the President of the Swiss Montessori Society in the late 1930s, wrote:

...during its earliest stages, the child learns more by action than through thought; suitable school equipment, serving to provide this action with raw material, leads toward knowledge more rapidly than either the best books or even language itself. Thus the skillful observations of a psychiatric assistant on the mental mechanisms of backward children were the point of departure for a general method whose repercussions throughout the entire world have been incalculable.

This kind of endorsement of Montessori's work gave her standing and credibility and led many to look toward her Method of education for ways to improve American schooling.

Also, in the late 1950s, the ongoing political climate of the cold war and the launching of the Russian Sputnik in 1957 added tremendous pressure on the American educational system to compete successfully with the educational systems in other countries. Rambusch (1963) noted, "College educated parents, many of whom are better educated than the people teaching their children, are like natives in an underdeveloped country, and are restless. They want something." Montessori schooling, new again on the educational horizon and holding proof of its obvious success in other countries where children ages four and five were reading and writing, seemed to show promise for American schoolchildren, as well as some hope for their anxious parents.

Finally, during the 1960s, with the advent of the *War on Poverty* program, considerable attention was paid to the difficulties that low-income children were having in school. It was believed that these children were headed for lives of poverty unless significant educational interventions in academic fundamentals were made (Mayer, 1964). Montessori had begun her work educating the poor and the disabled with remarkable results. It was reasoned that instituting her methods in the inner cities could offset some of the educational ills faced by the impoverished school children who lived there (Bereiter & Engelmann, 1966).

Finally, with the effects of the Women's Movement and the consequent demand for childcare, Montessori schools, which provided high quality education for children at age 3, filled a void for working mothers who wanted more than what custodial daycare or simple nursery schools could provide (Shanker, 1986).

In 1953, graduate student Nancy McCormick Rambusch researched the methods of Maria Montessori and wrote an article about the Montessori Method in *Jubilee*, a Catholic magazine. She was promptly flooded with letters from parents who wanted to know where to find, or how to establish, Montessori schools in the United States. It was not until 1957 that Rambusch became the first American after World War II to be trained in the Montessori Method in London by Dr. Montessori's son, Mario Montessori (Applebaum, 1971).

Rambusch returned to the United States to set up a Montessori classroom in her home in New York City for her own children and the children of some friends (Applebaum, 1971). Later, when she moved to Connecticut, she opened a Montessori school on a much larger scale. On September 29, 1958, after a 40-

year hiatus, the Whitby School became the first established Montessori school in the United States (Rambusch, 1962). Initially, prominent members of the radical Catholic left who were enthusiastic to revive and change the face of Catholic schooling in America funded the school with \$260,000 in hopes that the Montessori Method would be instituted and become a defining attractive characteristic of Catholic education in America (R. Packard, personal communication, April 2003; Rambusch, 1962, July 2).

Whitby School was initially founded to be a model in the revival of Catholic schooling in the United States. However, Nancy Rambusch's vision for the Montessori movement was more ambitious than those initial goals of the wealthy patrons and board members of Whitby School (Ossorio, 1962, June 29). Nancy wanted the Montessori Method to become part of the greater American educational cultural landscape, not just a characteristic of Catholic schools. In fact, her vision was so wide, and her work on behalf of the movement so all-consuming, that after less than three years, the Board of Trustees at the Whitby School asked Nancy Rambusch to leave her post as Headmistress. Her goal for the Montessori movement, they believed, had overshadowed her job of managing the school (Rambusch, 1962, March 26).

In 1961, Time Magazine wrote a feature article about Whitby School, the Montessori Method, and Nancy Rambusch the powerhouse behind the Montessori revival in America, which prompted a flood of 10,000 inquiries to the school for years afterward. In less than a decade Whitby enrolled over 300 children and was still growing, now considered an educational phenomenon. As

the first Head of School at Whitby, Nancy Rambusch wrote tirelessly, publishing article after article to introduce Montessori to America. She spoke at any meeting large or small to which she was invited, and spoke on the radio and television often. Her efforts produced a tremendous cascade of interest for the movement. Thus, for the first ten years, the Montessori movement was plainly associated with the name of Nancy Rambusch. Applebaum (1971) writes, “Newsweek (1963) referred to her as the ‘red hair dynamo of the Montessori revival,’ and the Washington Post (1962) saw her as ‘the educator responsible for renewing the nation’s interest in the Montessori Method of education’” (Applebaum, 1971).

In the center of this publicity, Whitby School served as the paradigm for Montessori schooling in America, and there was never a week that the school did not offer tours to crowds of eager educators and other adult visitors who traveled to observe how children responded to the Method (M. Raphael, personal communication, June 4, 2004). Nancy’s influence and powerful enthusiasm, coupled with the model of Montessori in Whitby school, led to a swift growth in the movement. By 1964, just six years after Whitby opened its doors, parents in New York, Chicago, Washington, Los Angeles, Houston, St. Louis, Philadelphia, and a score of other cities, eager for their preschool children to learn reading, writing, and arithmetic, organized more than 100 Montessori schools based on the model that Whitby school had provided (Gross, 1965).

It was not only Nancy Rambusch’s educative articles and lectures spawning interest, but also promising claims of success made by teachers who had established their own Montessori schools in those initial years. These claims

motivated still more parents to seek such schooling for their children, and to open schools on their own. In May of 1965, *The New York Times Magazine* dedicated its cover story to the Montessori Method, and illustrated what some teachers claimed the Method had done for their students. Ronald and Beatrice Gross (1965) wrote:

About one fourth of the children in a typical Montessori class read before they are six. Even more students can add and subtract large sets of numbers. Thomas Laughlin, a former screen actor who founded the Sophia [Montessori] School in Santa Monica, claims that his 5-year olds are beginning to learn algebra. Before they enter first grade, he says, "They are parsing sentences, composing music and speaking French. By the time they are 12 they can have accomplished everything the 18-year old accomplishes in a conventional high school, and many will have completed the equivalent of two years of college." This is the dazzling -- perhaps somewhat exaggerated -- image of Montessori, which has attracted so many middle class and upper-middle class parents.

The second Montessori movement in American resembled the first movement to an uncanny degree in the ironic fact that Montessori schools were founded by and enrolled with children from privileged and high achieving families (American Montessori Society [AMS], 1967). The Whitby School was established in a wooded valley, guarded by upper-class homes in Greenwich, Connecticut, and enrolled children of phenomenal wealth. De Leon (1966) writes that Jack Blessington, teacher, and later Headmaster at Whitby, maintained that the

Montessori Method, though developed for impoverished children, was yet appropriate for wealthy children because:

The theories used in the Whitby School would work equally well with the wealthy, since very rich and poor children have many problems in common. Sometimes, rich children are not in foster homes, but they are in homes that do not foster home life. This gives them a large share of insecurity, which must be balanced by a good school experience.

In a June 1964 article entitled, "Schools, Slums and Montessori," the isolation of the Montessori Method within the fringes of the upper classes is well illustrated. Martin Mayer (1964) wrote:

Montessori's techniques were used first in mental institutions, then in the slums. Though her approach has values for the education of children from all backgrounds, many of the specific materials were designed to help children whose experience was desperately impoverished. In the years since, Montessori's inventions have had little impact on the schools, but they have been highly influential with the better toy manufacturers. There is something amusing about sophisticated parents, who have stocked their homes with Montessorian toys, spending up to 1,400 dollars a year to secure for their four-year olds the values of exposure to Montessori's didactic materials in a schoolroom atmosphere. But it is not at all amusing to find that neither day-care centers nor kindergartens in the slums make use of the *only* systematic collection of educational devices designed for the sort of crippled children who are within their doors.

Despite the fact that Montessori schools were more available to moneyed and well-educated families, there was hope that the Method could extend itself into the areas that were in greatest need of high quality education. In Ronald and Beatrice Gross's feature article in *The New York Times Magazine* (1964) the authors speculated that Montessori schooling could in the future play a large role in the War on Poverty program. "Particularly relevant for American children is Montessori's success with the kind of child we call 'culturally deprived'--the big city slum youngster who is a major target of President Johnson's antipoverty program" (Gross, 1964).

Shortly after the *Times* article, *The Cincinnati Enquirer* described one such program in an article entitled "Poverty Program Adds Montessori." In it, they described a "nice, quiet classroom at Findlay Street Neighborhood House...where Mr. Gulick leads one of the nation's few Montessori classes aided by federal antipoverty funds...where children learn in harmony... are self motivated and successful" (Webb, 1965). Yet, the Montessori Method for the impoverished child never availed itself on a larger scale other than a few schools here and there, nor did the Montessori Method help revive the face of Catholic schooling as the founding members of Whitby had hoped.

Though Whitby had been founded with close ties to Catholicism and Catholic families, the movement was largely non-denominational. Outside the parochial framework, it was embraced by large numbers of college-educated parents eager to assure their children of a good start in life (Mayer, 1964). Nowhere in the first 15 years of the second wave of American Montessori was

the emphasis on the culturally deprived child. In this way, the Montessori movement had not yet faced a suitable test of its efficacy. Most schools were located in suburbia where advantages were heaped upon children, and it was difficult to separate the impact of home or school.

Maria Montessori's Casa dei Bambini in Rome was a social institution designed to redeem the lives of children who were desperately impoverished, who seemed doomed. Bringing Montessori education to a wider audience, specifically bringing it to the public schools was something that Nancy Rambusch was eager and determined to do. Ironically, her greatest obstacle was her initial collaborator, Mario Montessori, son of Maria Montessori, and president of the Association Montessori Internationale (AMI).

During the first four years of Montessori in America, there were three main areas of disagreement between pioneer Nancy Rambusch and Maria Montessori's son, Mario Montessori. These led to a period of difficulty and sluggish growth for the movement between 1958 and the early 1960s and finally evolved into a dispute over what was to be the mission of the AMI in America. The arguments between Rambusch and Montessori centered on: (1) Who was qualified to train aspiring Montessori teachers? (2) What were the requirements for aspiring Montessori teachers, and the process and content of teacher-training in America? (3) What should Montessori's educational program, that is Method, look like in schools and classrooms in the United States?

From 1958 until 1963, Mario Montessori and Nancy Rambusch worked tirelessly to convince the other of the validity of their views; instead, these divergent viewpoints ultimately split the two irreconcilably.

Maria Montessori had a highly authoritarian temperament. Mayer (1964) writes, “Her concept of ‘liberty’ came from the Catholic tradition, which offers an absolute freedom to do what is right, but reserves the authority at all times the power of determining what is wrong.” She had a host of disciples who worked and also lived with her referring to her as “*Mammolina*” (mother). Montessori never tolerated or desired collaborators. Dr. Montessori insisted that she was the only one who could invent and devise materials, and that she was also the only one who had the authority to develop pedagogy and put into practice any new ideas within the movement. She never tried to establish training centers outside of her own in Rome, and rarely trained her students to become instructors in the Method. In fact, her training programs concluded with the issuance of certificates that allowed possessors to describe themselves as Montessori teachers, but specifically forbade them to act as instructors in the Method (Mayer, 1964). Thus, at the time of her death, and even 40 years later, there are very few recognized people who were accredited by AMI to train teachers (A. Travis, personal communication, May 2003).<sup>2</sup>

The very limited number of teacher-trainers sanctioned by the AMI became a formidable challenge in launching the Method in America. Whitby school had been operating now since the fall of 1958 with less than 50 students and five teachers. Marcy Raphael, one of those faculty pioneers at Whitby

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<sup>2</sup> At the time of Montessori’s death, there were 12 AMI trainers; today there are 22 worldwide.

recalls, "Sometime at the beginning of that school year Nancy Rambusch gave me her album and said, 'I will be back in a week,' but I don't believe that I saw her again for at least three or four weeks. She had grabbed the flag [of the Montessori movement] and was running with it" (M. Raphael, personal communication, June 4, 2004).

It was Nancy Rambusch's Montessori album that Marcy Raphael relied upon during her first year at Whitby school while Nancy toured and lectured on behalf of the Montessori movement and sought to find trained, English-speaking Montessori teachers eager to work at her new school. Sometime in 1958, Nancy succeeded in recruiting Anne Westwood, an Irish native and trained Montessorian to work at Whitby, which ended up being a crucial success during this time of emergence for the school and the Method. Also during that year, Nancy Rambusch set forth to establish a teacher-training center at the school. Rambusch wrote to Mario Montessori suggesting that she could become the official representative of the AMI in the United States. She would raise money so Mr. Montessori could send a teacher-trainer to Connecticut, thus forming the first training course for teachers in America and establishing a formal American Montessori movement (Rambusch, 1959, April 30). Just three months later, in June of 1959, Mario Montessori wrote to Rambusch appointing her as the official representative of the AMI in America, thereby founding the American Montessori Society [AMS] which was to be an affiliate of the AMI, with its headquarters at the Whitby School. Under the terms of the agreement between the two organizations, the AMS was charged to act as the sole and exclusive

representative in the United States to promote, foster, and disseminate the pedagogical methods, principles, and techniques of Dr. Maria Montessori, generally known as the Montessori Method for a period of five years. AMS was to establish, direct, and maintain all AMI-approved, teacher-training courses in the United States, and would agree to offer employment on reasonable terms to any or all AMI certified teacher trainers approved by the AMI who expressed a desire to conduct a teacher-training program in the United States. Later, other stipulations were added to the affiliation, one of which gave AMI the right to start other Montessori societies in America under its own discretion (Joosten-Chutzen, 1960).

Within weeks of receiving her letter from Mario Montessori granting her permission to establish a training center in America, Nancy Rambusch, with the help of the Board at Whitby School gained permission from the State Department to host an Exchange Visitor Program. This allowed for a 12-month appointment for AMI trainers and teachers to work in the United States to impart teacher training and help establish the Montessori program within the school (Rambusch, 1959, June 25).

The first faculty member to arrive, Michelle Pourtale from Paris, France, was granted a two-year visa. She had been a Montessori teacher and teacher trainer for many years, and when the school year began she became a classroom teacher and continued, together with Anne Westwood from Ireland, to set the paradigm for Montessori schooling. It was not until late fall that Miss Margaret Stephenson, another of the few AMI teacher-trainers sanctioned by

Maria and Mario Montessori, arrived in Greenwich Connecticut on the Exchange Visitor Program which also allowed her to work on behalf of the school for two years. Her visa was set to expire in January of 1962. She was British, spoke English, and had been training Montessori teachers since 1946. Thus, in a rather amorphous way during the 1959-1960 academic school year the first Montessori teacher-training course was born. In the mornings, Miss Stephenson, Michelle Pourtale, and the rest of the Whitby faculty taught in classrooms. Then, after lunch when the children went home, Miss Stephenson and Miss Pourtale gave Montessori training to the faculty until late afternoon. This allowed the faculty to write their own albums (M. Raphael, personal communication, June 4, 2004).

During the 1960–1961 academic school year however, problems with the teacher training emerged. Margaret “Betty” Stephenson had grown interested in working with deaf children and spent most of her days at the Bronx, New York St. Joseph School for the Deaf. Trainees from Whitby were now expected to drive to Miss Stephenson in New York to receive her portion of the training lectures necessary to complete their training courses (M. Raphael, personal communication, June 4, 2004). But the Whitby School sponsored Miss Stephenson’s visa, and she was beholden to train teachers and establish classrooms there, a fact which she refused to recognize or honor. Nonetheless, in the summer of 1961, Mario Montessori came to Whitby and awarded diplomas to teachers, who did not have complete albums.

In the summer of 1961, Nancy Rambusch planned a second teacher-training program, but had run into considerable difficulty on the goal of extending

Miss Stephenson's and Miss Pourtale's visas into 1963 which would allow them to complete the training of additional teachers. Nancy Rambusch and Mario Montessori wrote back and forth on the progress of these visa applications, and in his letter of September 15, of 1961, Montessori accused Rambusch and board members at Whitby quite unfairly of not making an effort to extend the visa of Miss Stephenson. Citing his own connections in Washington, D.C., he implied that he could well offer a Montessori training course on his own without the help or the endorsement of Whitby and the AMS. Montessori (1961) wrote:

Fortunately, the sister of the president of the United States is interested in enrolling her children in our school, and put us in touch with several people in Washington D.C. who have paved the way to make it possible for the visas to be granted...The daughter of the Senate Majority leader, Senator Mike Mansfield, is fortunately a good friend and a firm believer in Montessori and was very instrumental in coordinating things for us in Washington. Whether we hear from Whitby or not remains to be seen, but I am certainly glad that once again we did not depend on them for any assistance in time of need.

Rambusch, in a letter of October 13, 1961 wrote back reasserting that she was doing everything necessary to secure visas for the AMI teacher-trainers:

The State Department has not been too helpful in solving our problems of visas for Miss Stephenson and Michelle Pourtale. The latest information I have is that their visas will be extended for this year, but they will be

obligated to return to their home countries for the coming year. I am attempting to reverse this decision by application to the State Department.

It is clear from the rest of the three-page letter however, that the concerns for the visas were but a small problem within a much bigger picture. Nancy Rambusch, with her charismatic leadership, which was further strengthened by her terrific humor and tireless work promoting the Montessori Method, had created a demand for teacher training that AMI simply could not accommodate. She wrote:

We have been asked by Washington, by Chicago, both established Montessori groups, by Oklahoma City, and by Mr. Laughlin (in California), to provide training courses. At present, there is only Betty Stephenson, who is dividing her time, in what we consider a far too fragmentarial way, among Mother Isabel's work in Philadelphia, the work at St. Joseph's, and Whitby; and if our worst fears are realized, Betty will have to return to England for at least two years before she will be allowed to return to this country... I am asking now whether or not you can find it is possible to send us someone to continue the work that Betty has undertaken, in the event that her visa is not renewed for the coming year. It seems critical that the Montessori training continue. It is reaching a peak of interest hitherto unsought for; and if we do not continue Montessori work in America under one central body, particularly in a teacher-training area, all of our efforts the last decade will, I fear, have been in vain.

Rambusch grew increasingly frustrated that diploma holders of the AMI were not permitted to train other Montessori teachers in the United States. While there were plenty of people who had received Montessori teaching diplomas through the AMI now living and teaching in America, none of these people was sanctioned by Mario Montessori to impart the Method to other teachers (R. Packard, personal communication, April 2003). No Montessori teaching diploma would be valid unless the course instructor was sanctioned by the AMI. Heeding to the terms of the AMS/ AMI affiliation and watching the movement stall exasperated Nancy Rambusch. In a letter dated February 13, 1962, Rambusch wrote to Montessori saying, "We continue to be plagued, as I am sure that you are, for teachers for the many schools that are in existence and those that are in the process of becoming."

In the then 60 years of Montessori education and practice, the fact remained that in the opinion of Mario Montessori there were only six people qualified to train others. Rambusch saw this as "an inadequacy of provision for the institutionalization of Montessori education, plus an egregious lack of programming for such teacher-trainer training." In her mind, the solution of the teacher-trainer problem could be solved if AMI diploma holders were permitted to teach aspiring teachers, who could then earn AMI teaching diplomas. She further held that one of the jobs of AMS should be to establish policies, for example, to review and assess the requirements for teacher trainers and determine if they were unrealistic for the demands in America. The AMS could establish uniform criteria, which would also honor the integrity of the Method by setting regulatory

standards to prevent just anyone from setting up a Montessori teacher-training school. In short, she held that the organization, among its many responsibilities, ought to set policies, standards, and procedures relevant to the American Montessori movement, stating to Mario in a public forum that “every movement must find its own structure.”

Mario Montessori insisted otherwise. Much as his mother had been, Mario Montessori was intent on preserving the integrity of the Method. He believed that preservation was the guiding mission of the AMI. He sustained his mother’s wishes in his adamant assertion that the only valid Montessori training could be gained from him, or from those he or his mother had trained; there was only one way to impart the Montessori Method, and only in that way could it be legitimate (Montessori, 1963). Teacher trainers had to be *chosen*, and this was something only he, as direct heir to Maria’s legacy, was qualified to do. Mario Montessori (1963) wrote about the careful process of selection of teacher trainers for the AMI:

... by observing teachers at work with children and choosing those who show in their practice to have really understood: when chosen, these continue to study. In Dr. Montessori’s time, during summer vacations, these teachers came around Dr. Montessori. She cleared their doubts, suggested further studies, gave them all new ideas or material she had evolved during the year and they returned home with a new enthusiasm and added knowledge which they spread to other schools. After several years, they were recognized as authorized trainers. The same process is

continued by AMI with the addition that AMI asks them now to assist authorized trainers first, so that any misconception or lack of knowledge they might have is eliminated...promising students, after having finished the (training) course may be asked to help correct books or supervise students at practice; but there is always an experienced Montessori trainer to supervise, guide and--if necessary--to discard them.

Thus, one major disagreement between the two Montessorians was based on the fact that Mario, in his effort to exactly control the dissemination of the Method, prevented Rambusch from responding to the market demand for training Montessori teachers in the United States. While interest in the Method was growing directly as a result of Rambusch's inspiring and electric lectures, talk show spots, and articles in feature magazines such as *Jubilee*, *Life*, *Time*, and *Newsweek*, not to mention the hundreds of articles written in newspapers and journals all across the country, teacher training from 1959 until 1963 remained accessible only under Mario Montessori's protectionist terms.

Another problem encountered in setting up training programs was that Nancy Rambusch and Mario Montessori did not agree on the basic educational requirements necessary for aspiring Montessori teachers. Mario Montessori felt that future teachers did not need college diplomas or any other form of educational training. Rambusch held that a valid teacher-training course must be established in line with American professional standards and insisted that the only way Montessori education could ever enter the public sector and become a mainstream form of education was to have colleges and universities sponsor the

teacher training. In order for colleges and universities to sponsor the training, students would have to fulfill other course requirements certifying them to teach in American public schools, requirements that were different from those required of a Montessori directress in Europe and Asia. Rambusch also felt that all teachers, Montessori trained or not, should have access to other kinds of pedagogical education (Rambusch, 1962).

Mario Montessori was adamant in his belief that teachers who aspire to be Montessori teachers should not have to couple this diploma with requirements and additional course work from the field of American education. Nor did he believe that Montessori training necessarily be undertaken after completion of an undergraduate degree, an accomplishment that Rambusch asserted as a prerequisite for the training. In a letter to Montessori, Rambusch (March 28, 1961) wrote:

...the future of Montessori in America can only be predicated on teacher-training which is seriously linked to university education. To this end, we have insisted that university graduates do the teacher training, and we are now engaged in contact with universities to implement the possibility of Montessori training in conjunction with their degree-granting facilities...The accompanying outline encompasses some of the kinds of courses which must be included in any kind of training if it is to meet certification requirements<sup>3</sup>, courses in child development, learning psychology, in educational research, as well as specific teaching

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<sup>3</sup> Rambusch is referring to the requirements acceptable from a certification point of view by the states of New York, New Jersey, and Connecticut.

methodology and instructional materials... It is our sincere hope to strengthen Montessori training in order that it is communicable and usable in American education.

In May of 1963, after years of personal correspondence between Mrs. Rambusch and Mr. Montessori on the topic of teacher-training requirements, Mario Montessori produced a pamphlet representing the views of the AMI. In it he wrote, "Montessorians must rise against neo-Montessorians who too hastily try to put into practice seemingly logical and marvelous additions to the educational practices of the Montessori Method" (Montessori, 1963).

Of Rambusch's desire to couple Montessori training with university requirements for teacher certification, and to limit access to Montessori training to those who had earned undergraduate degrees, Mario Montessori (1963) wrote:

With regard to Educational qualifications I should like to point out that Dr. Montessori herself was a medical doctor, not a teacher and therefore not qualified in education, that [sic] the results in her first school which made her name famous, were obtained with two assistants who had no qualifications at all... Other eminent people of our times have proved that possessing qualifications is not always the answer. Marconi had no University degree and I wonder if Edison, Ford, or Graham Bell had any such qualifications in the field that made them famous; I wonder also if Christ, Buddha, and Mohammed had any teaching qualifications. You will find, if you go around the world, that there are some excellent Montessori schools run by people without qualification in education.

This argument about the entrance requirements of those who would enter Montessori training further divided Rambusch and Montessori and contributed to the cessation of the AMS/AMI partnership in November of 1963. Now, years after both Mario Montessori and Nancy Rambusch have died, each organization, the AMI as well as the AMS, holds steadfastly to the teacher-training requirements outlined by either Montessori or Rambusch. Thus, Montessori teachers who are trained through the AMS must present undergraduate degrees for training, while the AMI does not make this a requirement for their Montessori teachers (A. Travis, personal communication, May 2003).

Within the AMI, the training procedure is highly formalized. The AMI pedagogical committee, whose members were first chosen by Mario Montessori (and are now chosen by Rinilde Montessori, Mario's granddaughter), determines course content along with prerequisites for training, and with Montessori training alone a person with no college education can become a Montessori teacher. During the training courses, which last for nine months and are held five days a week, eight hours a day, the trainer imparts hundreds of lessons in each subject area one by one, while the trainee takes notes, practices with the material, and then writes the entire lesson for the trainer's review. After ten months, each Montessori trainee has written and practiced every one of the hundreds of lessons in the curriculum and has produced a series of *albums*, each in one subject area. A student who undergoes the elementary training will have separate albums for lessons in mathematics, geometry, botany together with zoology, grammar, history and geography. All of the lessons in each album have

been written by the trainee and are complete with illustrations and diagrams to describe the sequence and movements in the lessons. All album lessons are read and reviewed by the trainer of the AMI training course. If the lessons are not transcribed in the exact detail or correct sequence of the presentation of the material, teacher trainees are expected to rewrite the lesson until the trainer deems the write-up of the lesson clear and perfect--up to the standard of the AMI. In the training process, the teacher-trainee is expected to relearn and review all of her mathematics, geometry, grammar, botany, zoology, geography, and history from kindergarten up to the end of sixth grade and demonstrate a firm understanding of all academic concepts. Mario (1963) wrote of training:

It is the AMI which appoints or approves the members of the pedagogical committee because the national societies recognized by the AMI are started by people who have taken the task of pursuing and asserting AMI's view in their country. AMI's concern is only with "pure" Montessori...the pedagogical committee must be composed of people who are fully cognizant and fully desirous to assert Montessori's directives.

The courses are standardized and based on the lectures given by Maria Montessori and her written texts. Those who receive AMI training in any training center in the world from Asia, North America, Europe, South America and Australia have undergone the exact same process, scope, and sequence of training (A. Travis, personal communication, May 2003). All teacher-trainees receive either the exact lessons that encompass the entire curriculum for the

*Casa dei Bambini*, children age 3 to 6, or the Advanced Montessori Diploma, which imparts all the curriculum lessons for children 6 through 12 years of age. The process has changed very little since Maria Montessori began training teachers herself in the early 1900s (A. Travis, personal communication, May 2003).

In 1960, when Margaret Stephenson came to offer the training at Whitby School, Nancy Rambusch protested the fact that there was only one set of notes for the training (Rambusch, 1962, February 13). These notes were never shared with students, and Rambusch thought that students should have their own copies of the lecture notes outlining and describing in detail how to use every material and impart every lesson to a classroom of children. In a letter dated March, 1960 to Mario Montessori, Rambusch wrote:

The question of the notes is still a burning one. What I proposed to Betty was that the *correct* notes be distributed to the teachers, so that they could, as they followed her lectures, annotate them by hand. In this way, the basic facts will not be altered. As I think we have discussed on other occasions, this *can* be a very real problem among Americans who are very eager to 'get going' on projects and do not always wait to have *all* the necessary detailed information.

Rambusch reasoned that if trainees could be given the notes, instead of having to laboriously write them as the lessons were presented (and rewrite them if they were not deemed acceptable by Miss Stephenson) the trainees could use the saved time to practice the lessons with the materials. She reasoned that her

trainees, all of whom had undergraduate education training, could actually learn how to use the materials after only three months of study if they were allowed to practice. Their training would then be extended through a one-year internship in a classroom under the guidance of a trained Montessori teacher (Rambusch, 1962). However, Mario Montessori (1963) insisted that the manner in which training was imparted would not be changed. He wrote:

Dr. Montessori introduced the compilation of the material album by the individual student because by having to do so, his or her attention was forced to focus on every detail of presentation, of aim, age of the child, etc. This forced focusing would not have been the case if [sic] the book had been handed over to them. It also required an effort and training in self-discipline, which Dr. Montessori considered to be very necessary in a Montessori teacher.

Mario Montessori's words did not alter Rambusch's views. She saw the impractical and tedious method of dictation and compilation of an album to be "part of tradition of distorted fidelity" (Rambusch, 1963). The division over the process of Montessori training also influenced the split between AMS and AMI in 1963.

Since that time, the process of training teachers in both AMI and AMS training centers has also not changed. AMI continues teacher education exactly in the format described above, through the process of demonstration and dictation resulting in the development of the albums (A. Travis, personal communication, May 2003). In short, the training is standardized, and the quality

and scope of the teacher training is the same in all of the 15 centers throughout the world. Members of the AMI pedagogical committee travel to administer written and oral examinations to every trainee and they alone determine if any given student should pass the exams. Those on the pedagogical committee also make certain that students unable to demonstrate comprehensive knowledge about the Method are denied diplomas. The pedagogical committee thus serves as a quality control board, ensuring that only those they believe will become adequate Montessori teachers are sanctioned (A. Travis, personal communication, May 2003).

The AMS, on the other hand, has considerably more training centers in North America than the AMI. The AMI, with its 15 training centers, awards fewer than 100 diplomas each year. The AMS, with 60 training centers, awards diplomas to over 1,000 teachers per year (M. Eines, personal communication, September 2001). AMS training is managed according to the standards outlined by Rambusch: six weeks of classes during the summer months, and one month of class work during the academic school year in which students are given albums and learn how to use the Montessori materials. These same students also undergo an internship of one academic school year under the guidance of a trained Montessori teacher, before they are given examinations and awarded diplomas (AMS Handbook for Accreditation, 2002).

AMS training centers are not centrally standardized, and training courses differ in format depending on the trainers (M. Eines, personal communication, September 2001). Additionally, all AMS trainers administer exams and determine

independently whether to pass each student. From the beginning, due to Rambusch's efforts, AMS courses have always been affiliated with several universities: New York University was the first affiliated education school in 1965 (AMS, 1972). Today the most notable university affiliated with AMS is Xavier University, where AMS certification is now earned through a Master's Degree program (AMS, 2002). The AMI did not adopt a degree program or affiliate with any university for a Master's program until 1991, and they retain their sole affiliation with Loyola University in Baltimore, Maryland (AMI, 2004).

Finally, the argument over what Montessori classrooms should look like in America for American children further aggravated the relationship between Rambusch and Montessori. Mario Montessori insisted that Montessori classrooms should only contain only the Montessori materials designed by Maria Montessori herself or by the AMI pedagogical committee. Anything else would make the classroom impure, not a true Montessori classroom, and therefore unable to produce the proper intellectual and emotional outcomes (Montessori, 1963). Martin (1964) cites Maria Montessori's own insistence on preserving the integrity of her classroom environments:

Just as the physical embryo derives its nutrients from the womb, the spiritual embryo absorbs them from its surroundings. Put children in the wrong environment, their development will be abnormal and they will become the deviated adults we now know. Create the right environment for them and their characters will develop normally.

The “second womb” is what Maria Montessori deemed to be young child’s proper classroom environment. Thus, to offer the correct Montessori setting, specified materials had to be in place. Any omissions and/or additions corrupted the environment. To add to the curriculum or to alter the classroom practice as outlined by Dr. Montessori by straying from the curriculum albums would dilute the Method and thus render it impotent (Montessori, 1912).

Montessori herself was not educated in the arts and thus her own schools never offered courses in art, music, drama, or sport in addition to her academic programs. She insisted that the academic program, if practiced properly, would provide opportunities for art and music and drama naturally (Montessori, 1976). The study of Early Man, for example, would lead the child to learn about early forms of expression in art, ancient music, and even ancient theater. Therefore, if the child felt the need to study the music or art of Early Man on his own, it could be done with the guidance of the Montessori teacher. For an adult to foist separate lessons of art, music, or sport on the child before he or she expressed interest would be to insert the adult *will* upon the environment, and thus destroy the pedagogy. Mario Montessori and the pedagogical committee of the AMI upheld that the proper Montessori program should not insert foreign language, art, music, drama, sports, *anything* into the academic school day.

Rambusch’s Whitby School however offered academic instruction using the Montessori Method and also offered Orff music, drama, French, carpentry, art, vocal music, horseback riding, and team sports. Rambusch’s goal was to insert the Montessori Method into American culture as an educational

phenomena related to American educational goals and values, while Mario Montessori himself simply wanted to establish a “few little schools,” and only then with the condition that the Method would remain untouched and unchanged from the requisites outlined by Maria Montessori. He wrote, “As long as there is a true example, there is hope” (Applebaum, 1971). Rambusch, on the other hand, believed that adding arts to the Montessori school did nothing to hurt the Montessori program, but simply situated Montessori education into the culture of the American school. Of Mario Montessori’s protestations she wrote, “No serious attempt has ever been made, previous to that now undertaken by the American Montessori Society to accommodate Montessori insights to American children. This does not mean a dilution of these insights, it means a situation of them” (Rambusch, 1963).

In addition to providing activities beyond the academic at Whitby, Nancy Rambusch argued that it was essential for American Montessori teachers to accept other educational and pedagogical advancements and materials that had been found successful in educating American children (Rambusch, 1963). Therefore, the classrooms at Whitby, while full of Montessori materials and staffed with trained Montessorians, also included some non-Montessori materials that teachers who were trained in teachers colleges wanted to add to the curriculum. So, while Montessori lessons were the main form of lessons, there were also consumable spelling workbooks, SRA series for reading comprehension, matching games and word cards made by the teachers or anything else that the faculty wanted to insert into the environment to enhance

the academic process. This practice of inserting American school curriculum into the Montessori curriculum, led to another unbridgeable gap with Mario Montessori, lending more weight to the split between the American Montessori Society and the Association Montessori Internationale in 1963.

In evaluating her argument with Mario Montessori, Nancy Rambusch made the connection that both camps of Montessorians were reliving a very similar controversy that had surrounded the Froebelian kindergarten movement in the early 1910s (Rambusch, 1963). At that time, there were two factions in the Froebel circles. Froebel, like Montessori, was considered by many people to have an almost mystical importance, and those people accepted him uncritically. Susan E. Blow, the intransigent leader of the Froebel movement, severely castigated kindergarten teachers who felt they could evolve, develop, improve, or modify any of the Froebelian practices. On the other hand, Patty Smith Hill, who was also interested in Froebel, maintained steadfastly that certain of his insights did not relate practically to American children. These two women were both appointed as academic faculty members at Teachers' College, Columbia University, and in 1910, at the behest of the President of Teachers' College, each gave on alternate Saturdays a course in programs for young children. In the period following this debate, Susan E. Blow and her followers ultimately lost momentum within the kindergarten movement because of their rigidity, and Patty Smith Hill's accommodations to American culture ironically ended up bringing Froebel more clearly into focus in the United States, though she was a less strict adherent to him (Unger, 1996).

Rambusch saw this historical scenario being played out once again. She saw the danger that over accommodation could present to the American Montessori movement (Rambusch, 1963). However, Rambusch was firm that the AMS would not function as a Montessori “historical society” but that it would be an “American society” predicated on building schools for American children (Rambusch, 1963). Rambusch hypothesized that it would take a decade to learn how Montessori could be as culturally relevant to American children as it has been to children of many other cultures (Rambusch, 1963).

Rambusch continually felt that she was working in the true spirit of Dr. Montessori (1912), who wrote:

My methods are scientific, both in substance and in aim...The method used by me is that of making a pedagogical experiment with a didactic object and awaiting the spontaneous reaction of the child. This is a method in every way analogous to that of experimental psychology.

In practice, Dr. Montessori designed a material, offered it to the child, and if the child worked with the material, learned the intended concept, and returned to the material to the shelf, she would keep it in the environment (Montessori, 1912). Of her schools she wrote, “It is my wish to make [them] a field for scientific experimental pedagogy...” She referred to classrooms as laboratories, and she called her classroom lessons “experiments” (Cohen, 1969). Early in Dr. Montessori’s career, Professor Henry W. Holmes of Harvard University implied that Dr. Montessori herself approached her work with a spirit of openness and a sound regard for rigorous examination. He wrote, “Dr. Montessori is too large-

minded to claim infallibility, and too thoroughly scientific in her attitude to object to careful scrutiny of her scheme and the thorough testing of its results. She expressly states that it is not yet complete” (Holmes, 1912). Logically, Rambusch asserted that she was following the Montessori tradition in her aim to continue the experiment in America, making additions and changes to the Method and curriculum in the United States as a result.

Rambusch read and reviewed Montessori’s works and concluded that *Pedagogical Anthropology*, the work reflective of her interdisciplinary approach to education, was the keystone of Montessori’s clinically oriented books, which included *The Montessori Method*, *Dr. Montessori’s Own Handbook*, and *The Advanced Montessori Method*. These books contained the greatest number of clinical insights and cogent descriptions of her methodology, and it was here that Montessori communicated her belief that observation itself is a form of pedagogy (Rambusch, 1962).

The declaration of specific techniques of observation and the presentation of tasks clarified the Montessori approach, and it was apparent that at the time Dr. Montessori wrote these earlier volumes she was still grounded in the development and practical applications of the Method. It is from these books that Rambusch derived her insights about Montessori’s Method of observation and sought to replicate them for the American child in the American culture (Rambusch, 1962). At that time in the 1960s, there had as yet been no attempt made to relate Montessori’s work systematically to current research in behavior

sciences, something Rambusch was eager to have the AMS do (Rambusch, 1963).

Rambusch rightly pointed out that those reared in what she referred to as the “Montessori mystical tradition” were afraid of, or at least uncomfortable with, exploring and analyzing the ways in which the Montessori Method could become culturally relevant to American children. She said that Mario Montessori’s AMI saw Montessori education as a closed system, whereas American Montessorians, with their pragmatic and empirical approach, viewed it as an open system. Rambusch insisted that the AMS had to approach the Method that way because only open systems would survive and prosper in American culture (Rambusch, 1963).

In 1915, when Maria Montessori came to the United States, her Method was situated as a picturesque European educational curiosity, and she never considered the question of whether her Method would work in the context of the American culture. As if the clock stopped when Maria died, Mario, like his mother, had no intention of reflecting on, or critically examining the Method in the United States. He was convinced that the Montessori Method was fundamental and universal; that is, that all children in all countries were the same, and that the Method, which appeals to the fundamental nature of the child, would work equally for all children everywhere. To add to or stray from the curriculum, alter the classroom practices as outlined by Dr. Montessori, would be to irrevocably dilute the potency of the Method (Montessori, 1963).

In contrast, Nancy Rambusch believed that she was following the precepts of Maria Montessori when she articulated her intention to re-examine the Method in the United States by observing children in classrooms, examining their response to the materials, and analyzing whether the curriculum and materials met the objectives of American education. If she perceived any lack, she would add to the curriculum so American children could optimally benefit from Montessori schooling. If Dr. Montessori was the “scientist” that she and her followers alleged, it seemed consequent that she would have approved of the ambitions Nancy Rambusch championed in America. Rambusch (1963) wrote:

The need for curriculum development within the American Montessori movement is extremely pressing. Montessori has not said all there is to be said about teaching Geography, History, Mathematics or Language. She said very little about Science, and less of the value about Art.

Yet, Rambusch’s efforts to examine and develop the Method were incongruously blocked by Mario Montessori, who had his own heavy responsibility of protecting the doctrine from false interpretation. In E. M. Standing’s (1957) biography of Maria Montessori, he wrote, “To Mario, has fallen the delicate task of safeguarding the integrity of the Montessori movement.”

All attempts at reconciliation were of no avail, and on November 28, 1963, Mario Montessori officially resigned from the AMS Board. For his reason he simply wrote, “Sometime after its foundation AMS detached itself from us because we could not approve the changes they were making to Americanize the Montessori approach” (Applebaum, 1971). In an effort to safeguard the Method

his mother had designed from any manipulation, Mario argued that Rambusch was off base in her understanding of Dr. Montessori's meaning of "scientific" and her apparent foundation in observation, experimentation, and conclusion.

During her lifetime, Maria Montessori evolved from a pragmatist to a preacher (Cohen, 1969). As a young woman, she was utterly pragmatic and adventurous, and clearly advocated a logical and precise approach of observation and experimentation to create a learning method that worked well for the destitute children of San Lorenzo. As she grew older, Maria Montessori was considerably less interested in the pursuit of further development and enhancements to the Method; in fact the latter portion of her life was spent primarily in the veneration and propagation of the Method she had created in her youth (Cohen, 1969). Mario Montessori, Dr. Montessori's illegitimate son, who did not grow up with his mother, entered her life well past the time of her experimental and creative phase. Thus, while Rambusch took her cues about Montessori from the period when Dr. Montessori was experimenting in an effort to evolve her work, Mario Montessori was protecting his mother's work in much the same way she herself finally did: closing it off to all speculation or alteration. They were both acting according to Dr. Montessori's example, but from different periods in her life. The impact of their argument created division among Montessorians, and the movement itself suffered a great deal, with Rambusch writing to Mario Montessori in December 19, 1962:

I cannot help ponder the fact that many of the outstanding people who have become interested in Montessori in the past, have turned away in

disgust when they have seen the petty politicking that exists at the heart of this movement.

Just before the split between the AMI and the AMS, Mario Montessori informed Nancy Rambusch and her AMS Board that the AMI would not recognize AMS training courses. Then, with Miss Stephenson as the master trainer, Mario Montessori established his own AMI training center in Washington D.C., *The Washington Montessori Training Institute*, which offered training and diplomas from the AMI. Nancy Rambusch and the AMS went on to oversee the establishment of Montessori training courses all over the country. By 1970, the AMS had offered training to some 1,000 teachers (Monson, 1971), while Mario Montessori's AMI center in America had trained 395 (Applebaum, 1971).

## THE MONTESSORI MOVEMENT IN AMERICA 1974-2004

Understanding the social and historical context of school desegregation and the inception of magnet schools is integral to understanding the history of the Montessori movement's spread into the public sector. Prior to 1968, the goal of school desegregation was to eliminate discrimination by law against blacks, in which white and black students were assigned to schools based on race (Steele & Levine, 1994). Districts found to engage in such discriminatory practices were required to dismantle their dual-school systems and to stop basing school assignments according to race. There was no requirement to promote racial balance among schools, only to refrain from explicit discriminatory practices. A remedy to the de jure desegregation throughout the 1950s and 1960s was found in the "freedom of choice" plans in which students were permitted to choose schools at the beginning of each academic school year (Steele & Levine, 1994). However, under the freedom of choice plan, both black and white students rarely chose opposite race schools. Yet, these plans were approved by the courts throughout the 1950s and 1960s as adequate remedies for de jure segregation (Steele & Levine, 1994).

In the Northern states, school segregation resulted more from residential segregation than from discriminatory school practices. To counter the effects of residential segregation, many districts adopted "majority to minority" transfer programs, whereby students could voluntarily transfer from schools in which their

race was the majority to schools in which their race was the minority. However, white students were found to be unwilling to transfer to minority-dominant schools (Steele & Levine, 1994).

In 1968, the Supreme Court ruled in *Green vs. Board of Education of New Kent County, Virginia* that eliminating racial discrimination by simply providing freedom of choice did not go far enough to solve the problem of segregated schools. The decision mandated more proactive remedies, and in the years following *Green*, school districts implemented desegregation plans that required black and white students to transfer from their formerly one-race schools to opposite-race schools (Steele & Levine, 1994).

From the outset, there was resistance to mandatory reassignment of students characterized by publicized violence and protests, as well as the departure of many white students from the public schools systems, known as “white flight” (Steele & Levine, 1994, Mirga, 1982). In one instance, a two-year mandatory busing plan in Baton Rouge, Louisiana resulted in the loss of 4,600 white students across every grade level. School officials wrote, “A student exodus of this magnitude plainly detracts from the task of school desegregation and raises disturbing implications for educational quality in the school system” (Mirga, 1982). In the face of this social upheaval, courts became ripe to hear alternative methods of desegregating schools (Steele & Levine, 1994).

In 1975, *Morgan vs. Kerrigan* prompted the creation of magnet schools, which were explicitly designed to desegregate school districts. Magnet schools provided a distinctive and attractive curriculum or instructional approach, such as

schools with a math or science emphasis, that could lure primarily white, middle-class families back into city schools or schools outside their designated neighborhood attendance zones (Steele & Eaton, 1996). Magnet schools were first approved as a component of a desegregation plan for the Boston Public Schools, and shortly thereafter, federal district courts in Houston (1975), Milwaukee (1976), and Buffalo (1976) also approved plans that would rely on magnet school programs to motivate voluntary transfers to achieve racially balanced schools. In this, another try at school desegregation began, having come full circle from allowing students to choose schools voluntarily in the 1950s and 60s, through forced busing of the late 1960s and early 1970s, then back again to a choice option, this time using the attraction of magnet school programs as a means of voluntary desegregation (Steele & Levine, 1994).

In this cascade, the districts ordered to desegregate scrambled to prepare desegregation and student assignment plans acceptable to the Education Department's Office of Civil Rights, often with only months to comply. Parent groups as well as Montessori teachers in both Buffalo and Milwaukee were poised to approach school officials to establish Montessori schools. Thus, in 1975 and 1976, Milwaukee, Buffalo, Cincinnati, and Houston each established Montessori programs as magnet schools in the first year following court orders.

At first, only a few Montessori magnet schools were opened in large, urban cities for the exclusive purpose of achieving racial balance. However, the magnet movement rapidly gained momentum in the 1980s, and more Montessori magnet schools were opened. In 1983, the publication *A Nation at Risk* showed

performance outcomes of American schools emphasizing the proven effectiveness of magnet schools. The desegregation emphasis in the magnet school movement lessened, and policy experts, education researchers, and politicians turned their attention to magnet schools simply because they were showing more effectiveness in student learning results than were the traditional schools (Steele & Levine, 1994). By the mid-1980s, magnet school programs met three different needs in educational reform: school desegregation, program improvement, and school choice (Chubb & Moe, 1990; Steele & Levine, 1994). This favorable attitude toward magnet schools in general helped shape a positive outlook of the Montessori Method and led to an intense growth period of Montessori schools in the public sector (Bilton, 2004).

The great enthusiasm for magnet schooling in the 1970s and 1980s prompted the establishment of many magnet schools in large, urban districts throughout the nation (D. Shapiro, personal communication, 2003). The Montessori Method was attractive as a magnet option because it was reputed to be effective in educating disadvantaged children. Historically in America however, Montessori schools had catered almost exclusively to the wealthy and had become synonymous with advantage and privilege. In the initial designs of magnet school programs in Boston and Baton Rouge, the magnet schools located in white neighborhoods offered a traditional, fundamental curriculum that was designed to appeal largely to working-class, black parents. The schools located in black neighborhoods, on the other hand, would include schools for the arts and Montessori schools, which were more likely to appeal to liberal, middle-

class, and middle-upper class white parents (Mirga, 1982). Board members in the cities of Milwaukee, Yonkers, Buffalo, and Cincinnati used this model, establishing Montessori schools in the poorest parts of the cities in an effort to attract both the local population of children, as well as the white, middle-class families who lived in affluent areas (M. Butz, personal communication, 2001).

The establishment of Montessori schools seemed a handy solution to the pressing social concern of school integration, as well as an avenue toward improving academic quality in America. Dennis Shapiro, founder and editor of *The Public School Montessorian*, a widely circulated newspaper covering American Montessori education and public policy, wrote in an editorial for Education Week in 1992:

Where Montessori education has been accepted in the public sector, it has often been a desegregation tool. The 'Montessori Method,' painstakingly developed by Maria Montessori in the early years of the century, was built on the needs of the neediest children. It is the advocacy of white middle class that revived the movement and kept it alive in the United States. Thus for city school systems like those in Buffalo, Cincinnati, Dallas, Houston, Denver, Kansas City, and Milwaukee, Montessori schools became an obvious strategy: Montessori magnets, if done well are academically effective with the neediest and draw children of the white middle and upper middle classes.

Indeed, districts in which schools were once characterized by the obvious segregation of race and social class found that Montessori magnet schools were

the most popular in their districts among both white middle class as well as the disadvantaged minority parents. In Kansas City, public Montessori schools were the most integrated schools with the highest test scores in the district (Falling Stars, 1998). Among the most integrated Montessori schools in Kansas City is Holliday Montessori, a school where 65% of the student body is African American. Holliday serves students from age three through the seventh grade, has the city's highest test scores, and attracts white students from some of the city's most affluent neighborhoods. Holliday's principal, Samuel Becker, says he has always considered the improvement of educational opportunities for minorities to be his foremost mission, not just desegregating the schools. If schools were integrated and not performing, minority parents would not choose to enroll their children. However, because of test scores and other successful outcomes, the city's minority parents, who had perhaps never heard of Montessori before the public schools introduced their curriculum, began to enroll their children. Becker maintains that, "Montessori is a European model that is new to minority parents, and it is here because of the desegregation program but the black parents are now sold on it" (Falling Stars, 1998).

Within five years of opening, Montessori schools in Milwaukee, Buffalo, Yonkers, Washington D.C., Houston, and Cincinnati all had waiting lists for families eager to enroll their youngsters (I. Buermann, personal communication, April 2003; P. Doseman, personal communication, 2003; R. Zener, personal communication, May 2001). Within ten years of opening their first Montessori school, many of these aforementioned districts had to find ways to accommodate

the continuous demand for enrollment in their Montessori schools (Zener, 1991). In the weekly Districts News section of Education Week in 1991, staff writers captured the essence of pressure that some districts faced trying to accommodate demand for Montessori Schools:

A Dallas middle school will be converted to the district's second Montessori school after a federal judge this month ordered the change to relieve a 1,000-child waiting list for the preschool program. U.S. District Judge Barefoot Sanders ordered that Harry Stone Middle School be consolidated with a neighboring middle school in order to accommodate the swell of parents demanding Montessori programs in the Dallas Independent School Districts.

In a May 2001 phone interview, Dr. Rita Zener, Change Facilitator of the Montessori Programs in the Washington D.C. Public Schools, stated that creating opportunities for Montessori schooling to meet parent demand became a serious challenge, echoing the dilemma in Dallas. She recalled:

Within two years after we opened the first Montessori classroom in an existing public school, we were already pressured to add classrooms to accommodate demand from parents who were eager to enroll their 4- and 5-year-old children in a Montessori classroom. Applications continued to exceed the number of openings in Montessori classrooms well into the 1990s when some 30 classrooms located in schools throughout the district had been opened as a result of parental pressure on the school Board.

Large cities Buffalo, Denver, Houston, Kansas City, Milwaukee, and Yonkers all expanded their offerings of Montessori schools within the first decade of inception, making Montessori schooling available to more children in many schools throughout their respective districts. By 1991, over 10% of all magnet schools in America were Montessori schools (Kahn, 1993).

In 1993, David Kahn of the Montessori Public School Consortium conducted a survey entitled *Reports from the Field* in which he selected six schools representing the largest and broadest of the Montessori schools in the public school system. He discovered that of the schools located in Buffalo, Cincinnati, Dallas, Denver, Kansas City, and Milwaukee, each ranked above the 50<sup>th</sup> percentile on standardized tests within their respective school systems. He also found that each of the Montessori schools in those districts had hundreds, and in the case of Cincinnati, thousands of children on waiting lists to enroll. All of the schools in the sample had equal racial balances, thus demonstrating that Montessori schools had exemplary success in desegregation efforts within those districts (Kahn, 1993). Indeed, while it was true that magnet schools were extremely popular nationwide as measured by the fact that 75% of all of the districts with magnets had a greater demand for students than slots could fill (Steele & Eaton, 1996), Montessori magnet schools remained among those magnets in greatest demand within large urban districts representing disproportionately high numbers of disadvantaged minority children (Kahlenberg, 2001). Thus, beginning in 1975, a new era for the Montessori movement was born, and Montessori education gained a foothold into the mainstream culture of

American education, making the Method accessible to America's inner-city poor for the first time in its history.

Some 13 years after Lloyd Barbee, then state president of the NAACP, first contacted the Wisconsin State Superintendent of Public Instruction to request an order eliminating de facto school segregation in the state, Federal District Judge, John Reynolds, on January 19, 1976 ruled that the Milwaukee Public schools were illegally segregated in violation of the Fourteenth Amendment rights of students and ordered the Milwaukee Board of School Directors to take immediate steps to desegregate public schools. The judge did not directly order busing or the use of racial quotas, nor did he set specific deadlines for the implementation of desegregation. Rather, he set up a three-year desegregation plan to begin in the fall of 1976, a plan that was to be based on the "magnet school" concept. The idea was to create a number of schools that would attract parents from all over the city to enroll their children so that integration could be attained peacefully and by choice. This plan, coupled with busing, eliminated the assignment of pupils to schools on the basis of residential settlement patterns and became known as the "Milwaukee Plan" (Butz & Miller, 1989).

During the 1920s, 30s, and 40s, immigrants from Germany, Italy, and England who had been trained by Maria Montessori came to the United States to seek asylum. One of those immigrants, Hildegard Soltzbacher, had established an independent Montessori school in Milwaukee in 1961, which she called the Milwaukee Montessori School. It was one of the very first Montessori Schools

established in the United States and was acclaimed for its unique program for the very young child. No one in the Midwest had ever seen anything like a Montessori school and interest in the method of instruction was incalculable. Soltzbacher recounts, "If I had charged all of the people who came to observe in my school, I would never have had to charge tuition for the children who attended!" (H. Soltzbacher, personal communication, 1999).

The potential seen in the pedagogy and curriculum of Montessori instruction gained the attention of Grace Iacolucci, one of the supervisors of early childhood education for the Milwaukee Public Schools [MPS]. At the time, Iacolucci was designing a program called Options for Learning for MPS and, as an option for young children, she established half-day Montessori classrooms throughout the city in 1973. She continued to add new classrooms to the city schools until 1975. Parents of young children who lived both in the impoverished, primarily all-black, sections of the city on the south and west side, as well as the more affluent white sections on the east side were dedicated to the half-day Montessori programs that had been offered to their four- and five-year-old children. Thus, in 1976, when the district sought to establish a system of magnet schools, parents whose children had been in Montessori classrooms between 1973 and 1975 stepped forward and said that they would be willing to have their children bused anywhere in the city if the schools were Montessori schools. Based on this economically and racially diverse group lobbying for the Method, as well as evidence of strong interest among other Milwaukee families, the first public Montessori magnet school, McDowell Montessori, was established in the

fall of 1976. Enrollment for four- and five-year-olds was open to all children throughout the city (Butz & Miller, 1989).

Over time, the Montessori program in Milwaukee grew more popular with parents, and in an attempt to meet the demands of the many families who wanted public Montessori education, the MPS Board established and opened three additional public Montessori schools between 1976 and 2001. Currently, there are four public Montessori magnet schools in the city of Milwaukee: McDowell Montessori, serving children from age four through the eighth grade; Greenwood Montessori, serving children from age four through the sixth grade; Craig Montessori, serving children from age three through the eighth grade; and Maryland Avenue Montessori School, which opened in 2001 to serve children from age three through the sixth grade. At this time, over 2,400 children a year attend public Montessori schools in the city of Milwaukee (P. Doseman, personal communication, 2003). Philip Doseman, a former Montessori schoolteacher, and now principal of Craig Montessori, is also responsible for oversight of these schools and acts as liaison with the administrations of all the other Montessori schools in the district.

In the early days of public school magnets, districts had to move quickly to locate and hire trained Montessori teachers (I. Buermann, personal communication, April 2003). Milwaukee was at a distinct advantage because Hildegard Soltzbacher had started a Montessori training center for the AMI in Milwaukee in the early 1960s, and for almost 20 years this program had been graduating approximately 20 Montessori-trained teachers per year. Thus, when

the Milwaukee public schools needed Montessori teachers for their youngest children, there were many eager applicants (P. Doseman, personal communication, 2003). However, this situation changed as Milwaukee public Montessori schools expanded beyond the pre-kindergarten and kindergarten levels into the elementary level. District coordinators for the Montessori programs had to then travel to Washington D.C. where the AMI had its only training center for elementary teachers in order to recruit faculty every year. In an interview in 2003, Philip Doseman recounted:

For 12 years, during the early 1980s and into the 1990s, we hobbled along managing to recruit the number of teachers that we needed for our schools. When the composition of the Board changed, when we had interim superintendents who had centralized budgets at the tips of their fingers, I went and lobbied so that I could get enough money to train the teachers that I would need down the road as more schools opened up and the need for Montessori trained teachers grew. I would say, 'you created this school, you created this concept of the magnet, and you tout it in the district, and now you have to staff it.' I would always get some money, but in 1998, I went to the superintendent and said, 'In order for our schools to be successful, you have to give me \$100,000,' which he did, and I administered that money over the course of five years. I convinced Hildegard to give summer training for the Casa dei Bambini Montessori diploma so that I had teachers for the four-and five-year-olds when we opened yet another school in the district, and of course to accommodate

the growth of my own school. So, for five years we had enough teachers, trained teachers, who could work in our schools. Now however, the future of recruiting outstanding faculty and paying for their training looks quite bleak. This year we are in need of four Montessori teachers, and I have faculty in the district that would take the training but we no longer have the money, the \$10,000 per teacher, to train them. Now if I foresee a need for a teacher, I have to go into my operating budget to get the money to train them. When I go to see anyone in central office they look at me, wave their hand and say, 'I have no money, don't even come in here.'

In the last academic year, 2003-2004, the Milwaukee Public Schools faced an unprecedented budget shortfall, but Doseman (personal communication, 2003) managed to recruit teachers because the benefit packages and salaries were so far above those of the private schools in town. He said:

As long as people are hungry for the benefits and the salary, I will have a chance to continue staffing the school. However, I have stopped recruiting on behalf of the principals in the other [public] Montessori schools. It is just too time consuming and difficult.

Doseman, who is forced to go into his already undersized operating budget to recruit, hire, and train teachers for his school feels the pinch of his state and district financial restraints and subsequent failure to help uphold the program. To afford the large expense for Montessori teacher-training and recruitment, Doseman makes the tough decisions to forego other expenses and reduce the number of support staff, including assistants in the classroom, and

establish larger class sizes. While Doseman successfully “hobbles along,” and manages to retain experienced faculty and recruit newly trained teachers, not all of the Milwaukee Montessori magnet schools can boast the same, specifically, a trained Montessori teacher in every classroom.

The newest challenge for Doseman is generated by the federal *No Child Left Behind* Act (NCLB). Under NCLB, those states that receive federal funds are required to set standards for grade-level achievement and develop a system to measure the progress of all students in meeting those state-determined, grade-level standards. The Wisconsin Department of Public Instruction set the annual measurable objectives on actual achievement levels of students in the 2001-2002 academic school year and use those scores as a baseline from which student achievement must improve. The state maintains that the number of students testing at the proficient levels using the Wisconsin Knowledge and Concepts Examinations (and the Wisconsin Alternate Assessments for LEP and Students with disabilities) must rise over a series of years so that all Wisconsin students attain proficient or advanced levels in reading and mathematics by the year 2014.

The specific goals of the Wisconsin Department of Public Instruction are as follows: beginning in 2001 through the academic school year of 2004, 61% of all students must become proficient in reading and 37% in mathematics. From 2004 through 2007, 67.5% of all students must become proficient in reading and 47.5% proficient in mathematics. By the year 2008, 74% of all students should be proficient in reading and 58% in math. By 2010, 80.5% ought to be proficient in

reading and 68.5% in mathematics; in 2011, 87% percent are to be proficient in reading, 79% are to be proficient in mathematics; in 2012, 93.5% are to be proficient in reading, 89.5% in mathematics and finally in the 2013–2014 academic school year all students, 100% of them are to be proficient in both reading and mathematics (Wisconsin Department of Public Instruction, 2004). These regulations ordering hefty gains in student test scores in a relatively short period of time worry Doseman, even though his school has exceeded the low goals for the past two years. He fears that the students will simply not keep up. He said “I can’t imagine that our students test scores will continue to rise each year. I suppose we will see then how loyal our parents are to the Montessori Method of instruction should test scores stall or go down” (P. Doseman, personal communication, 2003).

Doseman’s reservations are not unfounded. Under NCLB, those Title I schools not making Adequate Yearly Progress (AYP) for two years in a row are “identified for improvement” (IFP) and this identification is made public to all parents in the district and the state. Once given an IFP designation parents are permitted to switch their child to another school within the district for the upcoming academic school year. An IFP categorization also leads the Department of Public Instruction (DPI) to mandate educational specialists to enter the school to perform school-wide tutoring services meant to improve student test scores. In other cases the DPI can order the implementation of a school improvement plan (written by district officials) aimed at improving instruction for better test scores, or authorize restructuring of the entire school,

dismissing all faculty and doing away with the existing school curriculum in the place of one that has proven more effective at elevating test scores. Any and all of these sanctions can seriously erode the Montessori program that Doseman, for over a decade, has so carefully nurtured and developed for his district.

The odds seem unfavorable that Doseman's Montessori school in the inner city, educating some 65% of children in poverty, will stand up to the challenge set forth by the state. His hope, along with the hope of his faculty, is that this reform effort will just die out and lose momentum. This seems unlikely; NCLB is based upon the most comprehensive revision of education programs since the passage of the Elementary and Secondary Education Act of 1965, and has received widespread bipartisan support. The Wisconsin State Superintendent Elizabeth Burmaster (2004), a strong supporter of NCLB declared:

Ensuring a quality education for every child is the foundation of our New Wisconsin Promise. We are working with administrators, teachers, board members, and other school staff members to make it a priority to close the achievement gap between children of color, economically disadvantaged children and their peers.

The goals of NCLB in Wisconsin are firm and clear. The extent to which the state superintendent is willing to regulate and take over schools unable to meet the established performance benchmarks is also quite clear. The impact of these high stakes tests on public magnet Montessori schools in Milwaukee has yet to play out, but its trajectory is not difficult to imagine.

Milwaukee's Montessori magnet schools have always enjoyed a great deal of curricular independence granted by the state, and that independence to impart Montessori curriculum using Montessori pedagogy has historically led to solid academic gains. The Iowa Test of Basic Skills, a public school achievement test, is routinely administered to all elementary-aged children in Milwaukee beginning in kindergarten. For years teachers in the Montessori magnets in Milwaukee have approached these tests in a pragmatic way, taking some time from the Montessori curriculum and instruction for a review of content, test format, and test-taking procedures with excellent results. The Montessori magnet schools have been proud of their success, with scores well above those in the district and routinely above the national norms (Duax, 1989). Yet Doseman concedes that for all of the time spent on preparing for the tests, the outcome scores, even when quite good, provide little information about student achievement. In the inner city, where fully 65% of students live in poverty, test scores fail to tell the entire story. Some students panic or are anxious to the point of debilitation. They may come to school hungry, exhausted, or distracted by any number of things in their lives. Then there are those who manage the test-taking experience quite well and who even enjoy the challenge and the novelty of the process. Over the past decades, students enrolled in the Milwaukee's magnet Montessori schools not only managed the test experience successfully, they learned the requisite academic knowledge and skill-set to perform well, at least by national standards.

Oddly, popularity and success may not shield a thriving magnet school like Craig Montessori from the possibility of extinction. State-imposed tests pose a serious threat to the stability of a magnet school with such a highly specialized curriculum such as a Montessori school. The tests intrude on the relative independence of the magnet school curricula and have the potential to bring a public relations nightmare in the event that a school performs poorly. Test scores are a matter of public record, and schools that do not meet the requisite proficiency levels face considerable, sometimes frantic, publicity. Local media and press duly post district rankings in the local newspapers, and scores and school rankings are also posted on the Department of Public Instruction Web site and in public libraries. The result of not making the cut can lead to a student exodus or, according to the state ground rules, a heavy handed intervention on the part of the state, even a dismantling of a school altogether (replaced presumably by one deemed better at producing superior test scores from students).

While the aforementioned scenario sounds outlandish or inconceivable, the possibility that Craig Montessori could fade from the educational landscape in Milwaukee is real. At this time deficits in the both state and the local budgets are stretching education dollars to an extreme in Milwaukee's public schools. Now Principal Philip Doseman is expected to do more with less: while somehow maintaining the materials and faculty for his Montessori program, he must also allocate resources needed to succeed on high-stakes exams. The potential result is a Montessori program with a weakened mission: lacking the adequate

resources to impart the rigorous Montessori curriculum while also facing the possibility of stagnation or even a depression in student test scores as faculty struggle to cope with a dual curriculum, each under-funded, each under-allocated in time to be entirely effective.

Perhaps the most disturbing threat to the future of the Montessori magnet school is that the imposition of these tests may well push a successful school that has enjoyed curricular and pedagogical freedom such as Craig Montessori from better practice to worse practice. The Wisconsin Board of Education has established performance benchmarks that specify what students should know and be able to do. The new tests are highly content driven and based upon course sequences and model curricula that have been developed only over the last several years. The tests are rigidly tied to a curriculum content developed and imposed by the state government, and most every matter from the development of academic standards to the issue of determining cutoff scores on each of these exams is driven in great measure by political agendas. Craig Montessori educates children using a curriculum and pedagogy that has been developed, perfected, and practiced by educators the world over for close to one hundred years. Today, however, its autonomy to determine and impart curriculum, and to set high academic standards, (the very same that children in private well-to-do Montessori schools enjoy) is being encroached upon by the work of policy makers with political and personal agendas of their own. In this present wave of educational reform, it remains to be seen whether Montessori

magnet schools in Milwaukee are in a position to maintain programs for yet another generation of pupils.

At this time there are no accurate data on the number of public Montessori schools operating nationally. Accrediting bodies such as the AMS and the AMI, or the newer Montessori School Accrediting Association (MSAA) typically collect and maintain data on their own affiliated schools, while those schools operating without accreditation or affiliation from any Montessori organization are unaccounted. This makes it nearly impossible to obtain accurate data on the number and location of public Montessori schools currently operating in the United States. The best-regarded source of information on both public and private Montessori schools comes from Dennis Shapiro, founder and editor of the *Public School Montessorian*. Shapiro attempts to keep the most comprehensive and up-to-date list of Montessori schools in the United States by regularly contacting Montessori material vendors to learn if new schools have been established around the country. Shapiro says that he never knows for sure how many new schools are open; however, he asserts that in 2004 there were at least 4,271 Montessori schools nationwide. Of those, 317 were registered as public, charter, or magnet, and of those 317, 32 had middle school programs educating students in the sixth, seventh, and eighth grades. Almost all of the public schools were located in large, urban districts with a high population of minorities living in poverty (D. Shapiro, personal communication, 2004).

Assessing the interior life and overall condition of these schools is also challenging. Currently, the designation of "Montessori School," can be taken on

by any school, public or private, regardless of what actually happens inside classrooms, whether teachers are Montessori trained or not, or whether Montessori materials are available or not. Dr. Maria Montessori was unsuccessful in her efforts to trademark the use of her name, and to date there has never been an enforceable standard entitling a school to use the name Montessori (Montessori, 1963).

Almost immediately after the founding of the Whitby School and the establishment of AMS in 1960, the problem emerged that many schools eager to benefit from the popularity of the Montessori Method established and promoted themselves as offering Montessori education for children, when in truth, they offered little resembling the Montessori Method (AMI, 2004).

Already in 1929, sensing that many could exploit her work, Dr. Maria Montessori founded the AMI with the intent to propagate her ideas and the principles of the Method, to maintain the integrity of her work, and to ensure that it would be perpetuated after her death. Dr. Montessori's AMI was also responsible for the oversight of teacher training, and the AMI insisted that a teacher was deemed a Montessori teacher only if he or she had received training and a teaching diploma from Dr. Montessori herself or one of her chosen trainers within the AMI (Montessori, 1963).

During her time, there was never a significant rival duplicating Dr. Montessori's teacher training to open or staff Montessori schools. She was able to control the integrity and dissemination of her work, and all Montessori teachers in the world were trained by the AMI up until 1960. As such, Montessori teacher

training was monopolized from its inception in 1909 until 1963 quite successfully by the AMI. But this firm jurisdiction of Montessori teacher training was seriously compromised when Mario Montessori and his AMI withdrew recognition of Nancy Rambusch's AMS in 1963, giving rise to an independent American Montessori Society which offered its own teacher training courses. Using a vastly different model than the AMI for teacher training, the goal of AMS teacher training was to get teachers into classrooms as quickly as possible. The AMS teacher trainee worked in a classroom under the guidance of an experienced Montessori teacher for one academic school year, after three months of Montessori training offered the preceding summer. Rambusch's goal to help feed the aggressive demand for Montessori teachers in this country was well realized; by 1970, the AMS had seven teacher-training courses educating some 1,000 teachers from the United States and abroad (Applebaum, 1971).

During this same time Mario Montessori maintained his own, albeit modest, influence on Montessori education in the United States as the leader of the Montessori faction dedicated to "pure" Montessori education. He established and controlled the Washington Montessori Institute committed to teacher training based on the precepts of the Pedagogical Committee of the AMI which he directed from Amsterdam. He remained the protector of Dr. Montessori's name and her original ideas, kept tight control of all pedagogical concerns, including the training of teachers and the academic materials permitted in classrooms, insisting that it was best to have "a few little schools" that provided "hope" to those seeking a valid paradigm of Montessori classroom teaching in the United

States (Applebaum, 1971). By 1970 the AMI's Washington Montessori Institute had graduated 351 Montessori trainees, a third of the teachers trained by the AMS (Applebaum, 1971).

The charismatic Nancy Rambusch left her post at the helm of AMS in 1963 to fulfill the demands of her many speaking engagements stimulated by her prolific writing and the publication of her 1962 book, *Learning How to Learn: An American Montessori Approach*. Her work outlined the features and benefits of Montessori education and helped lead the phenomenal growth of the movement which the AMS was able to track in great measure by inviting newly established Montessori schools to apply for voluntary "affiliated status." To obtain affiliation, schools were required to provide documentation to the AMS on the academic preparation and Montessori training of each of their teachers and participate in the Society's consultation program in which each school was to be observed every two years by an experienced Montessori-trained consultant. Full school affiliation was granted to those schools that had at least one certified Montessori trained teacher on staff, and provisional affiliation was given to schools whose teachers were still in the process of undergoing training and certification.

The AMS program for affiliation standards helped newly emergent schools establish and maintain Montessori programs through their services and support. As a dual benefit, AMS-affiliated status provided identification with an organization that had become recognized as the definitive Montessori organization in the United States, thus aiding parents in their quest to discern whether a school was indeed a true Montessori school. The AMS pioneered the

idea of affiliation and created initial standards for Montessori school affiliation. By 1972 the organization boasted 202 affiliated schools throughout North America, Mexico, and Central America (AMS, 1972). But it was not until a new wave of aggressive growth, the advent of the public magnet Montessori school beginning in 1976 and extending all through the 1990s (Bilton, 2004), that both the American Montessori Society in 1981 and the Association Montessori Internationale in 1978 formally crafted the process of school accreditation.

To any observer, whether parent and teacher, the AMS and the AMI schools appear almost identical. However, while the AMS believes in the validity of Montessori's pedagogy and insights into child development, they take a firm stand against AMI pedagogical policy and modify their programs for the American educational scene. Thus, in addition to Montessori materials and the child-centered environment, in an AMS school the children can use materials found in traditional schools, such as workbooks for reading comprehension, spelling, and math, materials that would be prohibited in an AMI school. Additionally, AMS schools offer extra-curricular classes taught by specialists in music, gym, dance, art, theatre, and foreign languages.

The AMI believes that adding instructional material not specified by their pedagogical committee, such as classes in art, music, or sports, compromises the effectiveness of the academic environment on the child. These lessons can be taught, but only in the context of Montessori instruction, with the Montessori teacher as the instructor, and only when such subjects fit into the student's work interests. For example, if students are researching the lives of people during the

Renaissance, they may learn how to play short melodies on the wooden recorder, perform a play, or learn to paint in the style of any significant figure of that time. Teachers from the outside were seen as puncturing the academic day, thereby compromising the effectiveness of Dr. Montessori's educational plan.

The traditionalists of AMI, having established their own schools in the United States, developed their own formal accreditation process in an effort to assure prospective families that theirs was the authentic Montessori program, one without imbalanced modifications for American children (V. McHugh, personal communication, 2004). To that end, the AMI developed accreditation standards for Montessori schools with the purpose of assessing the school's compliance with AMI pedagogical standards, limiting the scope of their accreditation to pedagogical matters only, and never other aspects of the school's operations. In the informational brochure (AMI, 2004) distributed to those schools considering the accreditation process the AMI makes their aims clear, "The AMI school recognition program was initiated in the United States to assist parents in assessing whether schools are following Dr. Montessori's principles and practices in their original integrity and completeness."

The divergent goals and scope of school accreditation for AMS and AMI led to considerable differences in both the process and standards for accreditation. Joint accreditation with the National Association of Independent Schools (NAIS) was sought by the AMS to ensure that Montessori schools would undergo a rigorous audit of all practices to ensure their health and longevity (M. Basso, personal interview, December 2004). To that end the AMS requires two

parts in the school accreditation process. Adopting the long-established standards written by the NAIS for all private schools, the first part of the AMS accreditation process examined the institutional stability of the school with an assessment of the organization and administration, financial management, facilities, admissions, marketing and advertising procedures, enrollment, child records, personnel, school community, and the safe transportation of students (AMS, 2004). The second section of the accreditation process concerned itself with an assessment of the Montessori educational program with standards authored by the AMS.

The educational standards set forth by both AMS and AMI reveal that each organization views a true Montessori school with a different eye, the AMS more liberal and the AMI highly specific. AMS provides guidelines for Montessori schools while the AMI marks out their non-negotiable standards. For example, the AMS standards state that, “the classroom schedule allows for large blocks of uninterrupted work time,” where AMI spells out, “Classes are scheduled five days a week unless specified, with substantial uninterrupted work periods provided each day for two to three hours each morning and each afternoon five days per week.” Indeed, the goal of accreditation in each organization is poles apart. For the AMS, it is about *assimilating* into the educational landscape, and it is important to them that the educational community at large knows that AMS-approved schools have been put to the same requirements as other accredited schools, while also imparting the Montessori curriculum and pedagogy (M. Basso, personal interview, December 2004). For the AMI, accreditation works to

*separate*, because to be authentic, the AMI-affiliated school must stand apart from those Montessori schools not committed to “pure” Montessori. Thus today, as four decades ago, when Mario Montessori and Nancy Rambusch began their pedagogical dispute, the Montessori community remains at odds over what constitutes a Montessori school.

The AMS and the AMI do not share a common mission in their purpose and goal for awarding school accreditation and logically, both organizations hold vastly different requirements for earning it. Yet, for all of the differences between the AMS and the AMI accreditation requirements, there are three non-negotiable standards for private and public schools that these organizations maintain. The AMS (2004) and the AMI (2004) both state that:

1. Montessori schools should employ teachers who have Montessori training and diplomas for the grade levels of the children that they teach.
2. Montessori schools should offer a full complement of the Montessori materials requisite for the age grouping of each classroom.
3. Montessori schools should employ a Montessori coordinator or administrator with Montessori training and teaching experience to be responsible for program evaluation, curriculum implementation, teacher evaluation, and development as well as parent education.

These can be understood as the minimum requirements for any Montessori school. In 2004, the number of AMS-accredited schools numbered 80: 79 private and 1 public. The AMI boasts 171 accredited schools, of which 162 are private and 8 public. So while it is possible to gain some insight into the

interior life and relative condition of 9 public Montessori schools by virtue of examining the AMS or AMI accreditation standards, there were 208 public schools on record that were not affiliated or accredited by AMS or AMI yet still bore the name Montessori.

In a dissertation published in 2004 entitled *Characteristics of Public Montessori Programs in the United States*, graduate student, Heather Bilton, sent surveys to over 235 public Montessori schools<sup>4</sup> to learn about the characteristics of current public Montessori programs in the United States with a specific focus on school setting, teacher training, classroom instruction and testing. In the small responding sample of 65 schools, data revealed that of the three minimum standards cited above, the majority of schools fell short.

The first minimum requirements that the AMS and the AMI agree upon is that it is essential for all Montessori schools to have faculty who are trained to teach the age and grade levels of the children that they are charged to instruct. In the course of her study, Bilton (2004) found that almost half of the faculty employed in the public Montessori schools that responded to her survey did not have Montessori training. She writes:

Totals from the survey indicated that 576 of the 1094 teachers in public Montessori programs have Montessori credentials. The teachers with Montessori credentials in each school ranged from 0% to 100%, the median was 53% and the mean was 60%. It should be noted that twenty-three schools indicated that 100% of their teachers had Montessori

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<sup>4</sup> The number of public Montessori schools changes every year as schools open and close. At the time the data was collected for this paper, the amount of schools differed from Bilton's sample.

credentials and five schools indicated that none of their teachers had Montessori credentials.

Bilton's (2004) study revealed that of the 65 schools returning the survey, 70% maintained that their schools hired faculty for the Montessori programs without Montessori training, diplomas, or teaching experience. Fully 60% of the schools responding to the survey maintained that they provided training for teachers who did not have Montessori training but the length and quality of the training was not specified. Forty percent of the schools reported that they did not offer any kind of Montessori training for their untrained teachers due to a lack of funds (Bilton, 2004). According to these results, the scarcity of trained teachers appears to be the single biggest obstacle to implementing and maintaining a Montessori program in the public sector. Teachers in public schools are required to hold state certification in addition to expensive Montessori diplomas that take a full year to earn. Nearly half of the schools responding to Bilton's survey reported that they were unable to recruit and hire enough Montessori-trained teachers to ensure that even one trained faculty member would be in every classroom (Bilton, 2004).

What makes this information even more concerning for the viability and the subsequent future of Montessori schooling in the public sector is that the latest developments in teacher certification show that Montessori schools in some states are already losing ground in the struggle for survival. One of the features of the NCLB is its Highly Qualified Teacher (HQT) rule calling for universal standards in the training of all teachers. In Denver, Colorado, school

principals and district officials appealed to the state licensing board to recognize portions of the Montessori training and practice teaching as adequate to fulfill requirements of the state's teacher licensure program. Outlining the curricula used at accredited post-secondary schools such as the AMI-based Loyola University, they tried to demonstrate equivalences. But the state officials did not see enough correlation to recognize Montessori training in the present context of post-secondary education and the state requirements outlined for teacher education.

Betsy Hamilton, principal at Denver's Denison Public Montessori, surmised (Anderson, 2004):

There is a greater commitment to the idea of standards in Colorado now: standards for students and standards for teachers, in the environment that NCLB has created. I think school officials are interested in preserving those standards. They aren't in the mood to provide much leeway to non-traditional curriculums.

Typically, public Montessori schools have been able to employ Montessori faculty in their schools by using alternative licensing programs. In Colorado for example, the Denver schools were able to employ college graduates who had completed Montessori training at accredited colleges such as Loyola or Xavier University after passing content and Praxis tests. In another program that had been used for well over a decade in Denver, Montessori trainees received three-year adjunct licenses, which allowed them time to complete certification while they taught in classrooms. But both of these

arrangements to help the Denver public Montessori schools meet the goal of providing a trained Montessori teacher in every Montessori classroom have met serious setbacks. Though Denver is working to finalize its alternative licensing requirements, these must ultimately be approved by the state department of education, the same state officials who found Montessori falling short of most of its training standards.

At the end of the day, public Montessori schools have their funding and subsequent fates hinged on the outcome assessments of the children attending them. Untrained faculty charged with the task of imparting Montessori curriculum that they have never learned (and according to the survey, that 40% will never be trained to learn) may begin a pattern of student under-performance and under-achievement, endangering the future proliferation and continuation of the public Montessori school.

Just as having trained classroom teachers is deemed essential to carry out the Montessori Method of instruction, according to the AMI and the AMS all Montessori classrooms must have a *full complement* of Montessori materials for academic instruction in order to receive accreditation, and 90% of all the respondent schools in Bilton's (2004) survey reported that classrooms were fully equipped with the requisite materials. Eighty percent of all respondent schools indicated that in addition to the Montessori instructional materials, their districts mandated non-Montessori materials such as textbooks to fill in perceived gaps within the curriculum or help students prepare for state-mandated tests and assessments.

Ultimately, many districts align instruction with the content and performance criteria needed to attain success on achievement tests. While the use of traditional reading programs and other materials can be assimilated into the Montessori classroom environment quite successfully, too many of these mandates pose a risk of encroachment into the characteristic features of Montessori curriculum and pedagogy. What is notable in Bilton's findings is that schools in the responding districts do not rely exclusively on the Montessori curriculum in their attempts to achieve the academic expectations set by districts or states. This begs the question then, how much of the Montessori curriculum is and will be relevant in this era of outcome-based performance testing?

The third basic shared criterion for AMS or AMI Montessori school accreditation is that each school has an instructional leader or coordinator in place who has completed Montessori training and has teaching experience.

We take for granted today that most school leaders have been teachers, viewing their classrooms and the work of their faculty with a trained eye and knowledge of the components of good schooling. In other words, teachers in most schools know that the principal is the instructional leader, available to coach them for better performance. Yet, in public Montessori schools, many principals come to the job with inadequate knowledge of the Montessori Method. Of the schools surveyed in Bilton's study, 60% of the respondents indicated that the principal did not have any Montessori training. Ten schools indicated that the principals had training from the AMS or the AMI training centers, and 18 schools replied that they have a Montessori coordinator but often in a part-time role due

to lack of funding. Thus, only slightly over 20% of the public Montessori schools surveyed were able to provide faculty with Montessori-trained personnel available to coach them and offer feedback. This finding reveals that many schools are not fulfilling the basic requirement of providing instructional leadership to Montessori faculty.

While Bilton's sample size represents some 33% of all public Montessori schools<sup>5</sup>, the fact that most of those schools responding to the survey do not even fulfill the most minimum of standards based on the expertise of the AMS and the AMI, could bode ill for the future of the Method in the public sector. To obtain the results that Maria Montessori made world famous, schools must implement her model as a complete restructuring of the school and the teacher's role, rather than a series of piecemeal reforms. Implementing a few of her ideas and using the name Montessori to promote a school has two regretful effects: teachers and their students do not experience the educational Method that Dr. Montessori created with great success, and second, schools using Montessori in name only act as a negative form of public relations, giving parents and educators a distorted example of the Method and its potential effectiveness.

Montessori Magnet schools were successful in meeting the goals of a different era, the goals of desegregating schools, granting choice to parents, creating school site autonomy, and availing even the poorest children access to a high-quality, demanding curriculum. Today's universal standards and reliance on outcome-based tests to measure the efficacy of schools shifts these goals.

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<sup>5</sup> At the time that this paper is being written, the author continues to verify the number of schools listed on the Jola Publications website finding that many of the schools have closed and that new schools have opened.

School-site autonomy and curricular freedoms are out of favor, and efforts to desegregate schools are no longer a driving aim. School choice takes a new form; instead of attending schools because of their appeal, parents can choose to leave poor performing schools. The goal of providing all students access to high quality instruction continues, but now with the added promise of specific outcomes. This new educational climate may render public Montessori schools obsolete as a new generation of principals finds that staffing them, equipping them, and managing them is difficult and expensive and may not fulfill the goals of ever changing school reforms.

## IMPLICATIONS

From 1909 through 1995, 409 studies were undertaken about the Montessori Method of education. These studies cover 44 topics including academic achievement, art, body concept, child development, cognitive-intellectual development, curriculum (reading and mathematics) creativity, moral development, motor skills, play and fantasy, school administration, socio-economic status, teachers and teaching, and task performance. The bulk of these studies were concerned with academic achievement: 64 in total. Most of the studies did not adhere to accepted professional research standards; they either had insignificant sample sizes, lacked control groups, or failed to factor influences such as parent and family characteristics or differences between Montessori classroom instruction between schools (Boehnlein, M. M., 1996). In the last five years, educators and interest groups (the AMI most prominently), began funding larger and more scientific studies on the Method. However, there is no encompassing survey at this time of public Montessori schools.

There are no statistics on how many public Montessori schools there are, when they were established, how many students they educate, and at what ages. The most complete list of public Montessori schools is found in *The Public School Montessorian* (2005), a quarterly newspaper, but many schools on this list, upon a phone confirmation, are no longer operating as Montessori schools. These schools have closed or changed their status due to reported issues such as lack of parent interest, lack of enrollment, too much competition from charter

schools, lost student base during a school move, or other reasons unknown to the administrators. These anecdotal data, taken informally in phone interviews, are all we have; there is no formal compilation of data on why these schools are closing. We do not know how many teachers these schools employ, how many they need, and whether or not training centers are keeping up with alleged demand.

In the Magnet School Movement in the 1970s, 1980s, and 1990s, Montessori education enjoyed a single positive growth outlook. The present phase of the Montessori movement appears erratic; public Montessori schools are closing in one district and state and opening in others. Past experience offers insight into the central cause for this inconsistent development, namely the recurrent problem of staffing Montessori schools with Montessori-trained teachers.

Once the city of Milwaukee embraced the Montessori Method of education in the mid 1970s, they faced an ironic position. Public Montessori schools in Milwaukee were able to attract and engage parents, particularly those parents that may have left city schools for private school options, or who may have moved to the nearby suburbs to attend public schools. Yet the demand for Montessori schooling often exceeded the district's ability to provide trained teachers for all of the classrooms that were opening.

This has been a recurrent problem. In the popular concern with education during the early 1900s, the social unrest of the 1960s, and the staggering inequity of educational options for minority poor finally took the forefront of

educational reform in the 1980s. The unique offerings of the Montessori Method each time evoked a response that overwhelmed the limited resources for any orderly systematic development of the movement. In 1966, Gilbert Donahue, the president of the AMS, was quick to point out that when the time for an idea had arrived, it frequently transcended and made feeble the efforts of its originators and subsequent leaders to control it (Donahue, 1966). The sudden triumph of public magnet schools and the struggle to retain trained teachers for all of them was the same dilemma that Nancy Rambusch faced during the renaissance of the Montessori movement in the 1960s. Her response was to establish more efficient teacher-training programs that would get teachers into classrooms faster, hence the birth of the AMS teacher-training program.

However, during the Magnet School Movement and today, many public school districts instituted programs too quickly, without developing long-range plans for administrative and faculty training. In a feature article published December 13, 1989 in *Education Week* magazine, David Kahn, executive director of the North American Montessori Teachers Association, an arm of the AMI, wrote, "The most important crisis we are facing is that the programs may expand in advance of our community's ability to maintain the supply of Montessori teachers." Virginia McHugh, executive director of AMI/USA said, "Our biggest challenge right now is to be able to train teachers who can implement Montessori programs in the public sector without jeopardizing standards."

While the training centers differ greatly in their approach to teacher training, both the AMI and the AMS require extensive training beyond traditional

teacher certification. According to Dennis Shapiro, editor and founder of *The Public School Montessorian*, “Teachers have to be very motivated to seek the training, because there is no great salary benefit to having the Montessori diploma” (Cohen, 1989). During the meteoric rise of Montessori magnet schools, districts received money from federal sources and could offer motivated teachers the cost of the training. Today, many districts can no longer pay for teacher training to cultivate Montessori teachers. Bilton’s (2004) research revealed that well over half of the schools responding to her study employed non-Montessori trained teachers in Montessori classrooms. These schools also reported that these untrained teachers would most likely never be afforded adequate Montessori training unless they undertook it privately; there was simply no money for the training.

In the early 1990s, *The Public School Montessorian* regularly posted the opening of new public Montessori programs. It was rare to read of any Montessori school closings unless the school closed to move to a larger location to accommodate demand. Montessori school closings are now common enough that they are no longer front-page news. The spring, 2005 issue of the quarterly describes a 20-year-old Montessori school in Columbus, Ohio, Brentnell Montessori, that is now changing its status because for five years the school has not met standards for test-score improvement. The new school principal, Debbie Copeland, has no Montessori training, and the majority of the faculty members also lack Montessori training. She says, “This is my first year here; I have not focused on Montessori at all. I think the staff is comfortable with that.” Instead,

Debbie Copeland and her faculty have focused on the demands of NCLB and state testing. “No Child Left Behind has changed the way we do business,” she said. “It is increasing pressure on us to meet standards. It certainly focuses our work. We have a very rigorous testing program, which holds us accountable for children mastering state standards.”

Brentnell’s Debbie Copeland said that in addressing the needs of NCLB, “We are no longer Montessori. We attempted to marry Montessori principles to our district curriculum. It’s not a good fit” (Shapiro, 2005).

This story highlights the primary risk for Montessori schools in the public sector: administrators and teachers without Montessori training cannot implement the Montessori Method. Montessori training entails learning a core of basic strategies that structure the interaction between the child, his environment, and the teacher. Teachers without adequate training are unable to impart this fundamental curricular core, thus any attempt made to assume the role of a “Montessori teacher” without Montessori training is futile, compromising the integrity of the Method, the mission of the school, and ultimately, the identity of the program. There is little resemblance between the Montessori Method and traditional education. Further research should be undertaken to study how a traditionally trained teacher approaches the problem of imparting the Montessori Method, and with what level of success.

Another area for future research is to determine how many of the public Montessori schools established in the past years are still operating as Montessori schools, and if not, what factors led to their closing. In Milwaukee, the district is

struggling to sustain the expense of teacher training necessary to replace veteran Montessori retirees. In Kansas, Montessori student enrollment has fallen, perhaps due to the declining population of elementary-aged children or diminished parent demand. In Denver, the state Board of Education has decided to phase out the Montessori program, charging that Montessori teacher training falls short of the Highly Qualified Teacher (HQT) requirements, and that there is not an adequate match between their teacher licensure requirements and Montessori teacher training at post-secondary schools. All of these factors may be contributors to public Montessori school failure. However, research needs to be done also on the relationship between Montessori teacher training and traditional teacher training, as Connecticut's Department of Public Instruction has just become the first to recognize Montessori training as meeting their licensing requirements. Why does one state uphold Montessori training while another state does not? Why does one state continue to open public Montessori schools while another cuts the program? Another investigation detailing the conditions and characteristics of public Montessori schools that have successfully operated for five to ten years or longer could help those in the Montessori community to know what it takes to establish and maintain winning schools.

While *The Public School Montessorian* is now reporting school closings, new public Montessori schools also continue to open. One year ago, in April of 2004, Arne Duncan, CEO of Chicago's public schools, announced his plan to open several new public Montessori schools. The Montessori magnet schools are opening based on the characteristic rationales: to create choice options, to

meet parent demand, and to attract middle-class families into city schools (Rossi, 2004). In a twist however, the NCLB legislation may contribute to the establishment of Chicago's Montessori schools. Under NCLB, low performing schools in the city are placed on probation and many, even after years of district interventions, have fewer than 25% of students meeting testing standards. As a result, failing schools close and are slated for "rebirth," opening a year later as new schools. In the case of Chicago, the reconstituted schools will be Montessori schools. The irony is that if the new Montessori school fails to staff the school with trained faculty, they are likely to face the same fate.

The practice of hiring of untrained teachers in Montessori classrooms poses a significant threat to the long-term success of Montessori schooling in the public sector. We know that untrained teachers leave the profession at significantly higher rates than trained teachers and are known to actually *depress* the academic advancement of their students (Darling-Hammond, 2003). The length and intensity of teacher training in traditional school environments correlates with teachers staying in the job longer, as well as students scoring higher on achievement tests (Darling Hammond, 2003). Further research should be undertaken to study how Montessori training affects teacher tenure and student test scores in Montessori schools.

In a long-term study by Andrew and Schwab (1995) entitled *Has Reform in Teacher Education Influenced Teacher Performance*, the authors studied 11 traditional teacher-training programs. They concluded that students who graduated from five-year programs that included a liberal arts degree as well as

pedagogical training and a one-year student teaching assignment stayed in their teaching jobs at higher rates than students who underwent only a four-year teacher education program from the same institutions. Teachers who received training in either a 4 or 5-year program stayed at higher rates than those prospective teachers who received only several weeks of training in alternative programs designed to recruit teachers into schools experiencing shortages (Darling-Hammond, 2000).

Darling-Hammond (2003) held that teachers who had received teacher training that included instruction in the selection and use of instructional materials, lesson planning, student assessment, child psychology, and learning theory, as well as participated in student teaching that included regular feedback left the profession at one half the rate of those new teachers who did not undergo this type of preparation. Darling-Hammond (2003) writes that “graduates of teacher education programs felt significantly better prepared and more efficacious, and they planned to stay in teaching longer than did those entering through alternative routes or with no training.” The efficacy of teacher training is especially important because the most consistent predictor of a young student’s achievement remains the teacher’s years of experience (Darling-Hammond, 2003). Coursework in education and pedagogical training are also inextricably linked to teacher performance as evidenced by student outcomes (Laczko-Kerr & Berliner, 2002), and education coursework is a stronger predictor of teaching effectiveness than are teachers’ grade point averages in their academic majors or test scores on content knowledge (Laczko-Kerr & Berliner, 2002).

All Montessori teacher-training programs address the areas Darling-Hammond (2003) considers essential to long-term career stability. Today, all Montessori training centers (including the AMI in America) offer admission only to those who have completed undergraduate degrees; they requires prospective teachers to undergo one additional year of teacher training; and both the AMS and the AMI instruct perspective teachers in the use of the unique Montessori instructional materials, lesson planning procedures, student assessment guidelines, developmental psychology framework, and in-depth pedagogical methods. Montessori training also includes student teaching under the direction of an experienced teacher with regular observations and feedback from teacher trainers. Thus, those prospective teachers who complete Montessori training are, according to Darling-Hammond's (2003) criteria, among the best-trained teachers in America.

While the research reveals the relationship of thorough faculty training to lower teacher turnover and elevated student achievement in traditional schools, teachers who are hired to work in classrooms without adequate teacher training have been proven to have a potentially harmful impact on student performance (Laczko-Kerr & Berliner, 2002). Students who received instruction from uncertified teachers did not perform as well on state achievement tests as students of regularly certified teachers, and the research provides convincing evidence that subject matter knowledge, while necessary, is not sufficient for teaching well. Without courses in pedagogy, novices are unlikely to provide quality instruction (Laczko-Kerr & Berliner, 2002). Further study should be

engaged to determine how adequacy of training and length of teaching tenure affect student outcomes and the overall longevity and stability of Montessori schools.

Throughout its 100 year history, the Montessori movement has been fraught with a teacher-training problem. The adequacy of teacher training is the determinative factor in whether or not the Montessori Method will be able to continue in the public sector in America. While Montessori education is popular with parents, and there is growing research to support the efficacy of the Method, in order for the Montessori Method to remain in the public sector, states must make a commitment to the Method and all of its attendant needs. States must take an interest in supporting, even developing, training programs that will continue to fill the need for leaders and teachers in these schools. Teacher training has always been jealously guarded by the two reigning Montessori organizations. A new paradigm for the oversight and teacher training in Montessori public schools will need to be established if these schools are to continue with some consistency and success.

## CHAPTER 7: FINDINGS

The Montessori Method of education enjoyed three waves of popularity, each fueled by political and social history. Initially, in the early 1900s, Montessori was received as an educational curiosity and phenomenon but disappeared from the landscape in great measure due to World War I and Montessori's inability to travel to the United States to offer training about her Method. The second wave of popularity was spurred on by the panic that the launching of Russia's Sputnik satellite created in the U.S. Americans were eager to learn of a system of education in which children could learn more than their international rivals.

Initially, the Method held this kind of promise to many, as it was so new and different. Montessori schools were often established on University campuses and in areas of affluence. Thus from 1958 until the early 1970s, the Method was accessible for the well educated who could afford private schooling.

It was not until the 1970s that the Method entered the public sector, thus making Montessori a household name. During the late 1970s and throughout the 1980s when racial balance was a priority among school districts, Montessori schools were established in the public sector at an astonishing pace due to their ability to retain the white, middle class. But the pace has slowed over the past decade, and it appears that as new public Montessori schools open, many are also reported to close. Public school districts today have different priorities, and schools are no longer evaluated by the racial composition of children attending them, but by the outcomes of their standardized test scores. Dr. Montessori

abhorred tests for young children, believing them to be part of an overwhelming system of child oppression legitimized in the Victorian era. The efficacy of the Montessori Method is predicated upon an entirely different set of criteria than external testing: the consistent evaluation of each child's own relative progress.

## CONCLUSIONS

While independent Montessori schools have changed little over their history in the United States, and probably will not change significantly in the future, it is unclear given shifting national priorities whether there will continue to be a role for the Montessori Method in the public sector. From the 1970s through the beginning of the 1990s, the Montessori Method and Montessori magnet programs were used in the public sector to aid in the project of racial integration. With the advent of No Child Left Behind, the overriding goal of public schools has shifted: racial balance is no longer a major indicator in assessing the success of a school; rather, school effectiveness is now determined by student scores on outcome-based tests. In an era of outcome based schooling evidenced by standardized test scores, it is conceivable that Montessori schools may once again fade from access to children until another wave of reform begins.

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