

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

Introduction

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

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

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

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

Evolution of assumptions

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

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

Figure 1. Assessment Framework

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

Current state of student-level assessments

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

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

- **State-required assessments**

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

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

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

ACCOMMODATIONS FOR DISTRICT-LEVEL ASSESSMENTS: MILLARD PUBLIC SCHOOLS

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

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

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

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

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

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

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

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

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

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

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² For more information, see

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

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

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

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

⁶ [Interim assessments](#)

⁷ Example [PCSB](#)

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

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

- **Assessments in early childhood programs**

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

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

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

STUDENT-LEVEL ASSESSMENTS IN EARLY CHILDHOOD: MINNESOTA

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

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

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

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

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

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

Tradeoffs for Montessori programs

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

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

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

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

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

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

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

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

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

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