AMERICAN MONTESSORI SOCIETY®

education that transforms lives

Pathway of Continuous School Improvement Handbook

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PREFACE

About AMS

The American Montessori Society (AMS) is the foremost advocate for quality Montessori education, an innovative, child-centered approach to learning. AMS sets the high professional standards that inform Montessori education as practiced in AMS-accredited schools and taught in AMS-affiliated teacher education programs.

A not-for-profit organization with nearly 16,000 members worldwide, AMS is also a hub of all things Montessori: an information center for its members, the media, and the public; a voice in the public policy arena; and a mobilizing force for the global Montessori community, through support services, research, and professional development events.

Who We Are

We are a vibrant community of schools, teachers, teacher education programs, families, and friends determined to make Montessori a strong and positive force in education throughout the world.

Founded in 1960 by Dr. Nancy McCormick Rambusch, AMS set out to revive American interest in Montessori education, which had briefly flourished in the early part of the 20th century. The organization crafted a uniquely American approach to Montessori and soon drew educators, scholars, parents, and others eager to embrace the Montessori Method.

Nearly sixty years later, the American Montessori Society is an active, committed body of many thousands, whose members give freely of their time, knowledge, creativity, and experience, year after year, on behalf of excellence in education.

Mission, Vision, and Values

At the American Montessori Society, our mission and vision are the driving forces behind all our work and strategic goals. Our values guide how we articulate and accomplish our work.

Mission

Empowering humanity to build a better world through Montessori.

Vision

We envision a world in which quality Montessori education is widely recognized, highly desired, and accessible to all.

Values

- Respect
- Integrity
- Diversity
- Inclusiveness
- Responsibility
- Enthusiasm

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AMS PATHWAY HANDBOOK

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CODE OF ETHICS

PRINCIPLE I: Commitment to the Student

In fulfillment of the obligation to the children, the educator:

1. Shall encourage independent action in the pursuit of learning.
2. Shall protect the opportunity to provide for participation in educational programs without regard to race, sex, color, creed, or national origin.
3. Shall protect the health and safety of students.
4. Shall honor professional commitments and maintain obligations and contracts while never soliciting nor involving students or their parents in schemes for commercial gain.
5. Shall keep in confidence information that has been secured in the course of professional service, unless disclosure serves professional purposes or is required by law.

PRINCIPLE II: Commitment to the Public

The Montessori educator shares in the responsibility for the development of policy relating to the extension of educational opportunity for all and for interpreting educational programs and policies to the public.

In fulfilling these goals, the educator:

1. Shall support the American Montessori Society and not misrepresent its policies in public discussion. Whenever speaking or writing about policies, the educator should take the precaution to distinguish private views from the official position of the society.
2. Shall not interfere with nor exploit the rights and responsibilities of colleagues within the teaching profession.

PRINCIPLE III: Commitment to the Profession

The Montessori educator makes efforts to raise professional standards and conditions to attract persons worthy of trust to careers in Montessori education.

In fulfilling these goals, the educator:

1. Shall extend just and equitable treatment to all members of the Montessori education profession.
2. Shall represent his or her professional qualification with clarity and true intent.
3. Shall apply for, accept, offer, recommend, and assign professional positions and responsibilities on the basis of professional preparation and legal qualifications.
4. Shall use honest and effective methods of administering duties, use of time, and conducting business.

As American Montessori Society members, we pledge to conduct ourselves professionally and personally, in ways that will reflect our respect for each other and for the children we serve. We will do whatever is within our talents and capacity to protect the rights of each child to have the freedom and opportunity to develop his full potential. AMS requires that all member schools and teacher education programs comply with the AMS Code of Ethics. AMS relies solely on self-compliance of this Code.

Adopted by the AMS Board of Directors October 1969. Expanded June 1975. Updated 2008.

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OVERVIEW OF THE PATHWAY OF CONTINUOUS SCHOOL IMPROVEMENT

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OVERVIEW OF THE PATHWAY OF CONTINUOUS SCHOOL IMPROVEMENT

What is the Pathway of Continuous School Improvement?

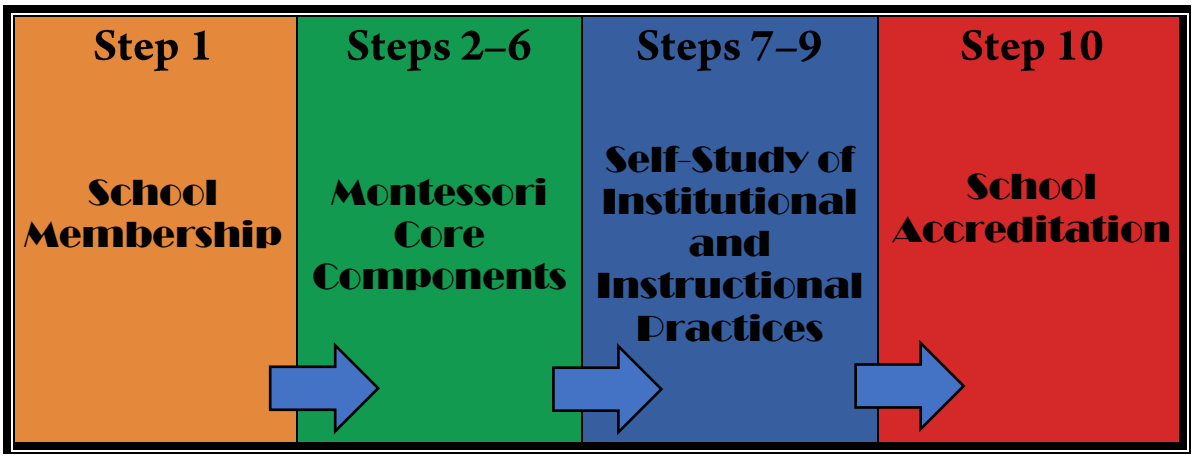
Prior to the development of the AMS Pathway, unless a school opted for accreditation, they were left with few resources to define their Montessori and institutional quality. The AMS Pathway framework is a school quality initiative consisting of 10 steps that allow schools to clearly articulate and identify Montessori quality—encouraging them to improve incrementally at their own pace, with guided support from AMS. The tangible result of participation is a quality seal indicating a school's present step on the Pathway.

In clearly articulating the various stages of quality a school can achieve, AMS helps schools engage in a process of continuous improvement that is mission-driven and which directly impacts student outcomes. Honest self-evaluation and a commitment to setting goals for improvement are at the heart of the Pathway of Continuous School Improvement. In this way, the AMS Pathway supports, motivates, and recognizes a school's ongoing commitment to Montessori professionalism, standards, and best practices.

AMS believes in the power of quality Montessori to transform lives. The Pathway of Continuous School Improvement supports our member schools by giving them a mechanism for articulating their quality and provides direction for ongoing self-paced improvement.

The Pathway is broken up into 10 steps, in four stages:

- AMS School Membership (Step 1)
- Montessori Core Components (Steps 2–6)
- Self-Study of Institutional and Instructional Practices (Steps 7–9), and
- School Accreditation (Step 10)



It is important to note that the Pathway step numbers do NOT correspond to the school accreditation standard numbers.

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School Membership (Step 1)

AMS Membership places a school at Step 1 of the Pathway of Continuous School Improvement. By becoming a member school, you have expressed to your staff and community the desire to become a part of the larger Montessori community and have available to you the professional development and research resources of the American Montessori Society. Schools at this step are not awarded a Pathway seal, certificate, or designation.

Montessori Core Components (Steps 2–6)

Steps 2–6 focus on the following five core components, established by research and consensus as the essence of the educational nature of Montessori education:

1. Properly trained Montessori teachers
2. Multiage classrooms
3. Use of Montessori materials
4. Child-directed work, and
5. Uninterrupted work periods

For more information on each of the core components, see page 11.

To qualify for steps in the Core Components stage, schools must meet the following requirements:

To Achieve:	School's classrooms must be led by:	And have in place:
STEP 2	At least 20% properly credentialed teachers	Mission statement & plan to incorporate core components
STEP 3	At least 40% properly credentialed teachers	Plus one additional core component
STEP 4	At least 60% properly credentialed teachers	Plus two additional core components
STEP 5	At least 80% properly credentialed teachers	Plus three additional core components
STEP 6	100% properly credentialed teachers	All core components*

*Schools that are unable to comply with core components due to state or local regulations are exempt from those requirements provided proof of regulation is submitted.

Institutional and Instructional Standards (Steps 7–9)

The Institutional and Instructional Standards stage asks schools to verify compliance with the AMS school accreditation standards, complete a self-study, assess strengths and areas for improvement, and create goals—culminating in a strategic planning process. Schools on the Pathway in Steps 7–9 have the option to apply for school accreditation candidacy or work through the steps outside of school accreditation candidacy—allowing each school to move through the steps at a pace that is right for them.

Although school accreditation standards are used for this phase, working through Steps 7–9 can benefit your school regardless of your school accreditation intentions.

To qualify at Step 7, schools must meet the AMS Institutional Standards (see Appendix 1), which include:

- Mission and Vision

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- Governance and Leadership
- Personnel
- Facility Resources
- Finances
- Records, Resources, and Support Systems
- Stakeholder Communications and Relationships

The verification process for Step 7 requires the writing of a mini self-study addressing how the school meets the institutional standards.

To qualify at Step 8 of the Pathway, schools must meet the Instructional Standards (see Appendix 1), which include:

- Teaching and Learning—Educational Nature
- Documenting and Using Results—Learner Outcomes

The verification process for Step 8 requires the writing of a mini self-study addressing how the school meets the instructional standards. In addition, at this step, a visit to the school must be conducted by a peer validator to verify the instructional standards are met. Depending on the size of the school, this could be a visit of one to three people.

To qualify at Step 9 of the Pathway, schools must meet the AMS Continuous Improvement Standard (see Appendix 1), create a profile of the school, and develop a strategic plan for implementation.

By breaking up accreditation standards into these three manageable pieces and providing assistance to schools via AMS staff and consultants, AMS aims for the Pathway to become a useful tool for all of our member schools when addressing best practices and making goals for continued improvement.

School Accreditation (Step 10)

For schools eligible for school accreditation, Step 10 is awarded after an onsite team visit, confirmation by the school accreditation commission that all standards and criteria are sufficiently met, and board approval.

How does a school benefit from participation in the Pathway?

- The process is one of discovery and empowerment. By working through the Pathway, a school examines itself with all stakeholders, in light of its own mission.
- Placement on the Pathway affirms that the school meets a standard of excellence in the implementation of Montessori education that is recognized by the entire AMS community.
- It provides an outlined and supported framework for ongoing school improvement and professional development.
- Pathway placement carries weight in marketing to the public as well as in advocating for your school with your state.
- Progressive steps along the Pathway result in strong self-evaluation and a strategic plan that fosters continuing school improvement.

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PATHWAY STATUS, PRIVILEGES, AND REQUIREMENTS

Following completion of the Pathway verification process, schools at Step 2 and beyond will be granted an AMS Pathway designation and seal. A school awarded a Pathway designation is encouraged to publicly advertise its Pathway step and to display the AMS Pathway of Continuous School Improvement logo on its literature and website. Continued permission to use the AMS seal will be granted following receipt of the annual report and fees. For schools remaining at a step for three years, additional verification with your Pathway consultant will be necessary to maintain step status.

Schools reaching Step 5 and beyond will receive an annual AMS certificate showing their designation as a Continuous Improvement School.

REVOCATION OF PATHWAY SEAL

Where there is clear evidence of noncompliance with Pathway requirements, the School Accreditation Commission may place the school at the appropriate Pathway step and/or place the school at Step 1 (AMS membership) until the issue is resolved.

Head of School Testimonials

"Entering the Pathway has been so beneficial, not just for me, but for our entire school. The support I have received from our AMS consultant has been invaluable as I have navigated my first few years as a head of school. Not only has the program helped us begin the accreditation process, it has also been a valuable resource for many areas, such as curriculum development, teacher support, professional development, marketing, and so much more. I would enthusiastically recommend this program to other Montessori schools looking at the possibility of becoming accredited."

—Melanie Jacobs, Montessori Center School, Goleta, CA

"Being on the Pathway is an amazing journey of guidance, enlightenment, wisdom, and, personally, for me, self-love and care. It allowed me to realize and find answers without being instructed but through careful guidance and beautiful reflections and activities. I am amazed at where I am today as opposed to my very first conference call. Forever grateful and looking forward to more!"

—Alexandra Gutierrez, Appleseed Montessori, Inc., Philippines

"The Pathway of Continuous School Improvement has brought remarkable insights and valuable improvements to us at The Learning Place. Information shared keeps our hands and minds busy and makes us pay attention to the little things."

—Bolanle Adewole, The Learning Place, Lagos, Nigeria

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GETTING STARTED

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GETTING STARTED

BEGINNING THE PROCESS

What are the eligibility requirements to get my school on the Pathway?

All AMS member schools are eligible for the Pathway of Continuous School Improvement.

Where do we go to get started on the Pathway?

The self-assessment can be found on the AMS website, under School Resources. Once the assessment, which covers the requirements for Steps 1–6, is completed, you will be contacted by an AMS Pathway consultant. If you believe you are eligible for a step further along than 6, your consultant will work with you to assess your placement and guide you to complete a partial self-study. However, schools will first want to establish themselves at least at Step 6 so they can be formally recognized as a Pathway school.

Do we have to start at Step 1, or can our school jump ahead if we qualify?

When you make the decision to participate in the Pathway, you will begin by completing a self-assessment to determine the current step placement for your school. The self-assessment includes first determining the proportion of recognized credential-holding lead teachers at your school, followed by how closely those classrooms implement the other four core components of Montessori education. Your initial placement at Steps 2–6 will be determined by how many of the core components your school meets, as determined through submitted documentation and in consultation with an AMS Pathway consultant.

Placement at Steps 7–10 requires mini self-studies to be written; therefore, placement at these steps requires an investment of time, typically 2–4 months, and a stakeholder involvement.

Must all levels of my school meet the requirements for Pathway placement?

Generally, yes. All levels of the school that identify as Montessori programs must meet the requirements. However, if a school is part of a hybridized educational approach, and if the outward public presentation of the school articulates the two programs clearly, then only the Montessori program is subject to Pathway eligibility.

VERIFYING STEP PLACEMENT

What will be done with the documents we submit?

Once submitted, your documents will be reviewed by AMS staff and consultants. They will remain within a secure digital file in our database while you are on the Pathway.

What documentation will we need to provide AMS to be placed at a step?

Each step on the Pathway will be verified through answers you provide as well as documentation submitted in support of your statements. This documentation is important because it allows AMS to stand behind you in promoting the high quality of your program. The following documentation is required at each step:

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Verifying Documentation

Step 2	• Written mission statement
Steps 3–6	• Parent or employee handbook section that includes information about class sizes and age groupings, schedule of children's day, and teacher credential requirements • Inventory of classroom materials
Step 7	• Board bylaws and member roster (if applicable) • Student attrition data • Job descriptions • Example of teacher contract and benefits package • Evidence of evaluations of faculty and staff by HOS (anonymous) • Scholarship/financial aid forms (if applicable) • Written safety and disaster plans • Fire/health/safety reports • Children's illness policy • Resource file for community referrals • Employee handbook and personnel policies and procedures • Parent handbook, including discipline and child abuse policies
Step 8	• Student assessment information—sample progress report/portfolio • Observation policy
Step 9	• Strategic plan, including goals, timeline, and resources to be used • Demographic information about the students and community

WORKING THROUGH THE STEPS

Once initial placement is given, how do we work toward the next step?

If continuing to move through the steps is your goal, AMS will work with you to help determine your specific next steps. We have support materials and consultants who can help you reach your goal.

How often can we consult with an AMS Pathway consultant?

We are here to support you in becoming the Montessori school you wish to be, and our Pathway consultants are available to work with you on your goals on a quarterly basis (4 times per year). To maintain your AMS Pathway status, you will need to have at least one consultation (by phone or videoconference) per year, following the submission of your membership application and/or Pathway submission. Consultations typically last between 15 and 30 minutes, though if your need is greater, consultations can be scheduled for up to 90 minutes.

How long can my school keep its placement if we choose not to move to the next step?

Placement at Steps 2–6 is verified each year in your annual membership report, so there is no need to turn in any additional information or do anything extra beyond what is required in your annual membership report.

For schools at Steps 7–9, provided you still meet the minimum requirements and retain AMS membership, placement is valid for 3 years, and you will not be required to submit additional information beyond what is required during your annual membership renewal.

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IF STEP 10 (SCHOOL ACCREDITATION) IS YOUR FINAL GOAL

Once a school has reached Step 6 on the Pathway of Continuous School Improvement, it becomes eligible to apply to be a candidate for AMS school accreditation. A school can choose to apply for accreditation at any time after achieving this step. The choice to pursue AMS accreditation is a choice to pursue excellence and the highest professional standards in Montessori education. Whether you are a small one-program school or a large school serving many ages, accreditation is possible and attainable.

In addition to attaining at least Step 6, a school must meet all of the following requirements to be eligible as a candidate for AMS school accreditation:

- Be in at least its third year of operation
- Maintain school membership with AMS
- Seek accreditation for all program levels served by the Montessori school
- At the time of application, a school must be, at minimum, 80% in compliance with the current AMS standards and criteria. The school must be 100% in compliance with the standards ***before*** it submits its self-study report to the AMS Office of School Accreditation.

COSTS TO PARTICIPATE IN THE PATHWAY

The Pathway of Continuous School Improvement is a free member benefit offered as part of school membership. As such, there are no additional fees paid to AMS beyond the cost of membership. If a school wishes to pursue Step 8 but does not have the intention of becoming an accredited school within 2 years, a peer validation visit is required. Although there are no AMS fees associated with this visit, there may be costs associated with hosting the visit, including validator travel, lodging, and meal expense.

TIMETABLE FOR MOVING THROUGH THE PATHWAY

Movement along the Pathway is unique for all schools and determined by the school's goals. As Montessorians, we understand the need to grow at a pace that is right for your community. We also understand that school accreditation may not be the goal for all schools. We hope the Pathway provides your school community the opportunity to celebrate and share its accomplishments and growth.

For those schools who do wish to pursue accreditation, we have found that schools that already meet at least 80% of the school accreditation standards typically spend anywhere from 18 to 24 months working through Steps 7–10.

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MONTESSORI CORE COMPONENTS:

STEPS 2–6

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MONTESSORI CORE COMPONENTS: STEPS 2–6

WHAT ARE THE CORE COMPONENTS & HOW WERE THEY DETERMINED?

In 2014, several Montessori organizations conferred to draft and endorse the *Montessori Essentials*, a policy document intended to provide a single voice outlining the essential elements in a Montessori environment and to guide the growth of Montessori in the public sector. This document, because of its broad consensus by Montessori organizations, became the basis of the 5 core components of Montessori education that AMS derived to create the Pathway of Continuous School Improvement's framework. The intention of the AMS Pathway was to find a broader way, beyond full accreditation, to support member schools with school quality initiatives.

While there are many components integral to quality Montessori implementation, the American Montessori Society recognizes 5 core components as essential in Montessori schools:

1. Properly trained Montessori teachers
2. Multiage classrooms
3. Use of Montessori materials
4. Child-directed work, and
5. Uninterrupted work periods

Fully implementing all of the core components should be a goal for all Montessori schools wishing to identify as high-fidelity Montessori programs. However, since Montessori pedagogy hinges on trained Montessori teachers setting up the prepared environment and facilitating the student use of Montessori materials, a primary indicator of your school's Montessori quality is the proportion of trained lead teachers employed there (working with students at the age for which they were trained). As a result, AMS prioritizes the weight of this core component.

What specifically is required for each of the core components?

1. *PROPERLY TRAINED MONTESSORI TEACHERS*

Properly trained Montessori teachers understand the importance of allowing the child to develop naturally. They are able to observe children within a specific age range and introduce them to challenging and developmentally appropriate lessons and materials based on observations of each child's unique interests, abilities, and development (social, emotional, cognitive, and physical). In this way, the teacher serves as a guide rather than a giver of information. She prepares the classroom environment in order to support and inspire the developmental progress of each student and guides each child's learning through purposeful activity.

A properly trained Montessori teacher is well versed not only in Montessori theory and philosophy but also in the accurate and appropriate use of Montessori materials. She has observational skills to guide and challenge her students, a firm foundation in human growth and development, and the leadership skills necessary for fostering a nurturing environment that is physically and psychologically supportive of learning.

It is essential that Montessori teachers have training in the age level at which they teach. This training prepares the Montessori teacher to design a developmentally appropriate learning environment, furnished with specially designed materials, where students explore, discover, and experience the joy of learning. AMS recognizes Montessori teaching credentials issued by AMS, NCME, or AMI, or by

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any other Montessori teacher education programs that are accredited by the Montessori Accreditation Council for Teacher Education (MACTE). Note that the Early Childhood credential qualifies you to teach in classrooms designed for 3–6 year olds; it does not qualify as a valid credential for Infant/Toddler classrooms.

Verification for This Core Component: Verification is accomplished through and in conjunction with the AMS membership department, which keeps records in our database on individual teacher members and teachers that work in AMS member schools.

2. *MULTIAGE CLASSROOMS*

Multiage groupings enable younger children to learn from older children and experience new challenges through observation; older children reinforce their learning by teaching concepts they have already mastered, develop leadership skills, and serve as role models. This arrangement mirrors the real world, in which individuals work and socialize with people of all ages and dispositions.

AMS-approved multiage groupings specify a 3-year age group at the Early Childhood and Elementary age levels. At the Secondary level, groupings may be 2 or 3 years. Children birth–age 3 may be grouped in varying multiage configurations.

The following age groupings are permitted:

- Infant: within the range birth–18 months
- Toddler: within the range 15–36 months
- Early Childhood: a 3-year age group within the range 2.5–6 years
- Lower Elementary: 6–9 years
- Upper Elementary: 9–12 years
- Elementary I & II: 6–12 years
- Secondary: the school must offer age groupings of either 12–14, 14–16, and 16–18 years or 12–15 and 15–18 years.

Verification for This Core Component: Verification is through either a parent or employee handbook or through website information that details information about class sizes and age groupings.

3. *USE OF MONTESSORI MATERIALS*

A hallmark of Montessori education is its hands-on approach to learning. Through the Elementary level, this includes the use of beautifully crafted, specially designed learning materials that beg to be touched and explored. Each material teaches a single skill or concept and includes a built-in mechanism (a "control of error") for providing the student with a way of assessing progress and correcting mistakes, independent of the teacher. The concrete materials introduce concepts that become increasingly complex and provide passages to abstraction, both in these grades and beyond. The AMS School Accreditation Commission and Teacher Education Action Commission offer these lists of suggested learning materials for each Montessori program level.

Verification for This Core Component: Verification is through the submission of materials inventories for levels or individual classrooms.

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4. *CHILD-DIRECTED WORK*

Montessori education supports children in choosing meaningful and challenging work of their own interest, leading to engagement, intrinsic motivation, sustained attention, and the development of responsibility to oneself and others. This child-directed work is supported by the design and flow of the Montessori classroom, which is created to arouse each child's curiosity and to provide the opportunity to work in calm, uncluttered spaces, either individually or as part of a group; the availability and presentation of enticing, self-correcting materials in specified curricular areas; teachers who serve as guides and mentors rather than dispensers of knowledge; and uninterrupted work periods, as described below.

Verification for This Core Component: Verification is through either a parent or employee handbook or through website information that details how the school actively preserves the aspects of freedom at each program level, as well as how the prepared environment encourages three aspects of both freedom and responsibility:

- Freedom of choice, movement, and repetition toward mastery
- Responsibility toward self, others, and the environment

5. *UNINTERRUPTED WORK TIME*

The uninterrupted work period is fundamental to the Montessori approach, which recognizes and respects individual variations in the learning process. Within the Montessori environment, the children need to have time to work through various tasks and responsibilities at their own paces. This uninterrupted work period is vitally important, as it provides the time necessary to build coordination, concentration, independence, and order—and it is when the assimilation of information is able to occur.

At all levels, students with special needs may require unique considerations, such as:

- variation in work time block
- more one-on-one teacher time and direction
- being removed from the class for therapeutic services

While each age group's work will look different, children should have ample time allotted for the uninterrupted work period at all program levels.

Verification for This Core Component: Verification is determined through the submission of classroom and/or level schedules that allocate and protect uninterrupted work time as per the age-specific guidelines below.

Infant & Toddler

Responsive schedules and routines help provide infants and toddlers with a sense of security and self-awareness through predictability. Classroom schedules recognize that daily routines *are* curriculum for the infant and toddler. Large uninterrupted blocks of time support infants and toddlers to express independence, engage in spontaneous activity, and self-regulate through periods of high and low activity. Infant & Toddler programs allocate and protect at minimum a 2-hour work cycle daily,

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including *45 minutes of uninterrupted work time. This time block allows for adult-assisted mealtime, snacks, hygiene, and nap/rest routines.

At the **Infant level**, each child typically has his/her own schedule, which should be posted for parents and teachers. There might be a period of time during which some meals are "scheduled," such as breakfast between 8:00 and 9:00 for older infants who can sit at a table and eat solid foods. But, in general, the guiding principle is "follow the child," based on each child's schedule and observed needs. Infants should be free to move throughout the day, and should not be placed in any kind of apparatus that restricts movement or in any place/position they cannot get out of on their own. (The exception to this is the very young, nonmobile infant, who may spend time lying on his/her back and/or his/her stomach throughout the day. The teacher would place the child in this position and would move him/her based on cues they receive from the infant.) Overall, you should observe children freely moving and exploring the environment, with adults observing and assisting individual children only as needed.

At the **Toddler level**, children explore materials in the classroom environment independently and may work at the shelf or take a work to a table or floor rug. Teachers are observing or quietly moving through the room, assisting or redirecting as needed. Teachers may also be modeling for/encouraging toddlers to "restore their work" as they go and facilitating problem solving between students. At this level, the source of interruption to the work cycle is adult-driven rather than schedule-driven. Interruptions occur when a teacher chooses to model a material for a child who is having difficulty, engages a child who is reluctant, or redirects a child toward another material if it is being used inappropriately.

Observations made during the morning cycle should include children freely moving, choosing work, exploring materials in all areas of the room, moving inside and outside, helping to prepare or getting a snack, and using the toilet/having diaper changed.

Early Childhood

At the **Early Childhood level**, a 3-hour uninterrupted work cycle 5 days per week is optimal, and a 2- to 3-hour work cycle 4 days per week is the required minimum. Schools provide large blocks of unscheduled time to ensure that individual children have time to settle into a task that interests them and are not unnecessarily interrupted when they are engaged in a worthwhile activity.

During the work period, teachers observe the behaviors of the children and invite individuals and small groups to short lessons when they see opportunities to assist a child's progress. Optimally, the majority of each morning and afternoon is devoted to self-motivated work. This time may include individual or self-chosen small-group activities and short lessons by the teacher for children who have accepted an invitation to the lesson.

The uninterrupted work period does not include whole-class lessons or other activities such as adult-led group circle meetings, for which the participation of all children is required. Outdoor playtime, specials, and enrichment classes for the whole group should not interrupt and are not included in the work period.

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Elementary

At the **Elementary level**, a 3-hour uninterrupted work cycle 5 days per week is optimal, and a 2- to 3-hour work cycle 4 days per week is the required minimum. During the uninterrupted work cycle, one should see students engaged in developmentally appropriate work. The work should include Montessori hands-on materials that are appropriate for the individual needs of each student. The teacher will be working with students individually and in small groups in hands-on engaging Montessori lessons. Students will be collaborating as they work on a task or research project together. Students are also managing work expectations. A contract, work plan, or work journal may be used to help with organization and time management skills.

At the Elementary level, full-class lessons should not take place during the uninterrupted work cycle. Rather, they should be presented before or after the uninterrupted work cycle. Outdoor play time, specials, and enrichment classes for the whole group should not interrupt and are not included in the work period. Circle time should also be held before or after the uninterrupted work cycle.

Secondary

At the **Secondary level**, the length of the work cycle varies by setting. Small programs with a single Secondary-credentialed guide will look different than large programs, particularly at the Secondary II level, when course requirements and credits needed for diplomas are considered. The critical aspect is encouraging flexibility within extended blocks of time. Secondary programs allocate and protect at minimum a 2-hour work cycle for core curricular subjects (math, English, history or humanities, sciences, and additional world language(s)). It is important that this large block of time is not divided into daily one-hour class periods.

Student work periods may vary in length each day. An observer might see the following lessons presented during the uninterrupted work period: mini-lessons, impressionistic lessons, procedural lessons, small-group lessons using flexible groupings based on needs, and individual lessons. Students are taught to use a checklist and to plan their work time to be able to meet deadlines. This includes independent work, small-group work, self-checking work with controls or other methods, and project work by individuals or groups. The teacher/guide is working with/among students. Many teachers have a space in their classrooms for students to request lessons on topics they identify.

Brief student-focused large-group activities (including mini-lessons, group initiatives/community building, solo/reflection time, seminar/discourse, etc.) may occur during the work cycle. These activities include the active engagement of the teachers. Whole-group activities are scheduled at natural transition times (e.g., at the beginning of the block, before or after lunchtime, at the end of the block/day) so that the work cycle can be preserved.

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At the Secondary level, during the work cycle, there should be no lectures or presentations that last longer than 20 minutes. Individuals should not be removed from the class for services or programs. There should not be a lot of unnecessary socializing, group meals or snacks, or school-wide assemblies during this time.

Verification for This Core Component: Verification is determined through the submission of classroom and/or level schedules that allocate and protect at least 2 hours of uninterrupted work time 4 days a week at each level (except for *Infant/Toddler, as noted on p.14).

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OVERVIEW OF THE SELF-STUDY PHASE:

STEPS 7–9

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OVERVIEW OF THE SELF-STUDY PHASE (STEPS 7–9)

BENEFITS OF FREE CONSULTATION

Your AMS Pathway consultant is here to support you. Consultants are trained Montessori professionals who are familiar with the self-study process; they can advise you on questions about how to meet AMS accreditation standards and criteria, help you determine what policies and practices of yours meet the standards, and let you know where there may be gaps. In addition, they can advise you on how to codify and gather evidence so that you meet the standards.

FIRST STEPS OF THE SELF-STUDY PHASE

1. Oversight:

- Establish an internal oversight group for the self-study and also for the evaluation and planning that follows. This group is called your steering committee.
- Determine who will be the chair of the steering committee.
- Identify the subcommittees needed, and determine the responsibilities of each subcommittee. (For very small schools, a steering committee is sufficient.)
- Determine who will be the chair of each subcommittee, if applicable.

As the authority that governs the self-study process within the school, the steering committee is a government. It appoints and charges subcommittees; it approves and accepts their reports; and, acting directly or through the head of school, it interacts with the agency(ies) involved in the school's accreditation. Its tasks from beginning to end can be characterized as organization, management, evaluation, and communication. The last is as important as any. In the self-study process, everyone in the school community should know everything; there are no secrets. A well-governed self-study reflects collegiality at its best.

2. Organization:

- Identify the AMS-required standards and criteria, and make sure you fully understand what information each criterion requires.
- Determine the timetable of committee meetings; faculty meetings; and distribution of and deadlines for surveys being used, revisions to publications, mission statement, and strategic plan.

The importance of good organization cannot be emphasized enough. Having an outline, timetable, and action plan will greatly assist committees in researching and writing their sections. These should be periodically reviewed and modified throughout the Pathway process.

The research and writing of the self-study report are involved and detailed processes. Therefore, it is essential that the committees are comprised of individuals who can dedicate themselves to the task for the entire process.

REQUIREMENTS OF A PATHWAY SELF-STUDY

A school must use the AMS Pathway Self-Study Template, which includes the following:

- **Cover Sheet**
- **Affirmation of Compliance**
- **Table of Contents** with page numbers

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- **Rosters**: Steering committee, subcommittees, and other members of the community involved in the self-study process, including the roles of each committee. It must be clear that the self-study was a collaborative process.
- Description of the school's **Self-Study Process**
- **Standards Assessment and Checklists**, to include an affirmation of compliance with each of the standards' criterion as well as a narrative description describing how standards are met at your school

INVOLVING SCHOOL STAKEHOLDERS

It is crucial that the self-study process includes representatives from all the stakeholder groups within the school community: faculty members at all levels, administration, representative parents, and board members, if applicable. Community involvement may include any or all of the following: surveys given to stakeholder groups, focus group participation, and the inclusion of representatives of each stakeholder group in your accreditation steering committee. Lack of this inclusion could result in having the self-study document returned to the school for further work with all constituents.

ORGANIZATION OF THE SELF-STUDY REPORT

A school must use the Self-Study Template to complete the report, ideally maintaining the order of the template. The report should be in narrative form. Charts, graphs, pictures, bulleted lists, and other conventions may be used to illustrate specific information within the report.

SUBMITTING THE SELF-STUDY

Please send one electronic copy of your self-study report to pathway@amshq.org. The AMS office uses an electronic Dropbox for submission of files that are too large to email. Please contact the Office of School Accreditation for information about how to access the Dropbox.

Once submitted, the self-study will be reviewed and checked for all the required components by a staff member or consultant reader who has experience with the AMS self-study process.

If additional information or revisions are necessary, the school will be contacted to go over the specifics.

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INSTITUTIONAL STANDARDS: STEP 7

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INSTITUTIONAL STANDARDS: STEP 7

OVERVIEW OF INSTITUTIONAL STANDARDS

To attain Step 7, a school must demonstrate that it is in compliance with 90% of each of the school accreditation standards and criteria, outlined in Standards 1, 2, 5, 6, 7, 8, and 9. Compliance with these standards demonstrates to your community that you have created and maintain institutional practices that are part of accepted best institutional practice in schools. It demonstrates that policies and procedures are in place to provide the school with direction and purpose according to its governance model and shows that the school manages its relationships to and with employees, maintains the upkeep of facilities conducive to Montessori educational practices, creates sound financial policies and practices, maintains records in accordance with local and state requirements, and effectively communicates with stakeholders concerning all aspects of its operations.

STANDARD 1: PHILOSOPHY, MISSION, AND VISION

The quality Montessori school:

1.1 Creates written mission and vision statements with input from stakeholder groups.

1.2 Publishes a written non-discrimination policy that addresses race, color, religion, sex (including gender identity, sexual orientation, and pregnancy), national origin, age (40 or older), socio-economic level, physical ability or genetic information, and learning style.

1.3 Develops and updates a demographic profile of the school, its students and faculty/staff, and the community.

1.4 Communicates the mission and vision to build stakeholder understanding and support.

1.5 Reviews the school's mission and vision annually to ensure alignment with its educational goals and philosophy.

1.6 Has created and continues to foster a program, culture, and inclusive community of students, families, faculty and staff, and governing body (if applicable), that embraces diverse perspectives, cultures, backgrounds, and identities.

SELF-STUDY DETAILS

Your self-study narrative to demonstrate compliance with this standard should include:

- The current mission statement
- Description of the process used to formulate and review the school's mission statement
- Description of how the school is achieving its mission and how it is working toward greater fulfillment of its mission

STANDARD 2: GOVERNANCE AND LEADERSHIP

GOVERNANCE

The governing body:

2.1 Establishes written policies and procedures that provide for the operation of the school and for the short- and long-term sustainability of the governing body and school leadership.

2.2 Functions as the strategic, policy-setting body and delegates' responsibility to the head of school/principal/executive director ("administrative leader") for implementation of the strategic plan and all school operations.

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2.3 Provides support to and evaluation of the administrative leader.

2.4 Provides an organizational chart that clearly defines roles, lines of authority, relationships, and accountability.

2.5 Is knowledgeable of and complies with applicable federal, state, and local laws, standards, and regulations. (If the school is exempt from licensing or compliance, written documentation verifying the exemption is required to be kept on school grounds.)

2.6 Adheres to all applicable laws and regulations related to the education of students with disabilities.

LEADERSHIP

The administrative leader:

2.7 Promotes a culture of participation, responsibility, and ownership.

2.8 Provides opportunities for collaboration among stakeholders to make the school's mission and vision a reality.

2.9 Seeks and responds to school community concerns in order to clarify expectations and to strengthen stakeholder commitment.

2.10 Institutes, publishes, and facilitates systems that promote consistency and continuity of the curriculum within and across program levels.

2.11 Employs a system that analyzes learner outcomes and school effectiveness.

2.12 Ensures oversight of curricular and extracurricular activities that are sponsored/offered by the school.

Note: Criteria 2.13–2.18 are included in Step 9 of the Pathway.

SELF-STUDY DETAILS

Your self-study narrative to demonstrate compliance with this standard should include:

- An organizational chart defining roles, relationships, and accountability
- Description of your governance model
- Evidence and description of evaluation processes measured against effectiveness of leadership. This should include both the governing body and administrative leader(s).

STANDARDS 3 and 4 will be part of the INSTRUCTIONAL STANDARDS: STEP 8 on page 29

STANDARD 5: PERSONNEL

The quality Montessori school:

5.1 Employs an administrative leader who has professional qualifications that meet state and local regulations, as applicable.

**Emerging criterion effective July 1, 2020: Administrative leader (head of school/principal/executive director) holds a bachelor's degree and qualifies with the minimum number of points required in the Head of School Requirements Verification, or has an approved portfolio variance.*

5.2 Employs lead teachers who hold a credential for the level they are teaching that has been issued by an AMS, NCME, or AMI teacher education program, or any other MACTE-accredited course (or who are enrolled and in good standing in a qualifying Montessori teacher education program) and qualify with the minimum number of points required in the Teacher Requirements Verification form. In addition, lead teachers must meet all applicable requirements of the state or territory in which they teach.

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**Emerging criterion effective July 1, 2020: lead teaching faculty in the core subjects of math, English, history or humanities, sciences, and additional world language(s), who work with students ages 12 – 18 will be required to have the appropriate Montessori credential, i.e., Secondary I or I-II. The credential must be issued by a teacher education program accredited by the Montessori Accreditation Council for Teacher Education (MACTE).*

5.3 Employs Elementary and Secondary lead teachers who hold a minimum of a bachelor's degree from a regionally accredited college/university in the U.S., a degree that is deemed to be equivalent, or one that meets the nationally recognized post-secondary educational standard in the state, province, or country of issuance as determined by a recognized U.S. credentialing agency (i.e., a credentialing agency that is a member of National Association of Credential Evaluation Services).

**Emerging criterion effective July 1, 2020: All Infant & Toddler and Early Childhood lead teachers hired after July 1, 2020 must hold a minimum of a Bachelor's degree or equivalent as stated above. All existing employed Infant & Toddler and Early Childhood lead teachers may remain continuously employed at their current school in their current position in perpetuity.*

5.4 Provides written employment agreements for all school personnel annually, including compensation, benefits, and terms of employment.

5.5 Follows a written school-wide faculty salary scale that recognizes credentialing, education, and years of service.

5.6 Provides written job descriptions for all positions within the school.

5.7 Provides an employee handbook that includes, but is not limited to, the following: AMS code of ethics, an organizational chart, a non-discrimination policy, an anti-harassment statement (including sexual harassment), a discipline policy, description of employee conduct expectations, a grievance procedure, and a policy and procedure for termination.

5.8 Engages in annual staff training on written policies and procedures in employment handbook, including non-discrimination and anti-harassment policies.

5.9 Ensures that all administrative and teaching staff document plans for completion of a minimum of ten (10) hours per year of professional development, which includes a minimum of one (1) hour of continuing professional development per year regarding the education of students with disabilities.

5.10 Ensures that all non-credentialed employees receive an orientation to Montessori philosophy and practice.

5.11 Ensures that the head of school and 100% of credentialed lead teachers maintain active membership in the American Montessori Society.

5.12 Implements an annual evaluation system that sets goals for professional growth for all teaching and administrative personnel.

5.13 Provides dedicated planning time for lead teachers on a weekly basis.

5.14 Maintains ratios of students to adults as appropriate for the age level:

Infants (Birth – 18 months):	4:1
Toddler (15 – 36 months):	8:1
Early Childhood (2.5 – 6 years):	15:1
Elementary (ages 6 – 12 years):	20:1
Secondary I (ages 12 – 14/15 years):	20:1
Secondary II (ages 14 – 18)	25:1

5.15 Assigns at least one Montessori credentialed lead teacher at the age level to meet the following maximum student/adult ratios:

Infants (Birth – 18 months):	10:1
Toddler (15 – 36 months):	16:1
Early Childhood (2.5 – 6 years):	30:1
Elementary (ages 6 – 12 years):	30:1

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Secondary I (ages 12 – 14/15 years):	50:1*
Secondary II (ages 14 – 18)	100:1*

**In Secondary programs that utilize a departmental model in which credentialed lead teachers teach multiple sections of a core subject (math, English, history or humanities, sciences, and additional world languages), each lead teacher shall have a total student caseload no higher than stated above.*

SELF-STUDY DETAILS

This section of your self-study will describe the policies and practices in place to ensure that employees are well qualified and are assigned professional responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience). Provide the details as to how employees are supported through ongoing evaluation and professional development and are sufficient in number to support the school's mission and vision. Fair, ethical, and nondiscriminatory employment practices should be outlined as well.

We recommend including an organizational chart to illustrate your staffing structure and explaining where the chart is published for staff reference. Provide details about the classroom staffing model (for example, do you use leads or co-leads? How many assistants do you assign to each classroom? What are the qualifications of an assistant teacher? Etc.) and information about all other personnel—including custodians; food, health, and transportation staff; and psychologists and/or counselors, as well as area specialists whose focus may be physical education, reading, music, art, library, etc.

STANDARD 6: FACILITY RESOURCES

The quality Montessori school:

6.1 Certifies that the facilities meet all applicable federal, state, and local laws, standards, and regulations including, but not limited to, building codes and safety standards as required by local and civil authorities and the Americans with Disabilities Act.

6.2 Provides and maintains a site, facilities, services, equipment, and furnishings to ensure a safe environment for all occupants. Evidence of mandated safety protocols are provided in the form of completed health, fire, playground and/or other inspections.

6.3 Provides and maintains a site, facilities, services, equipment, and furnishings that support the school's instructional and co-curricular programs, which includes consideration of light, ventilation, and temperature.

6.4 Has written policies for the access to and use of the school site and facilities by individuals or groups outside of school hours with provision for adequate legal protections.

6.5 Has facilities that are adequate for developmentally-appropriate gross motor activity including space for safe, vigorous physical activity.

6.6 Has accessible, neat storage for teacher materials.

SELF-STUDY DETAILS

The Facility Resources narrative will illustrate how your school provides facilities, sites, and equipment that meet optimum health and safety standards, conducive to a safe learning environment in alignment with the mission of the school. This section is to include:

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- Description of buildings and grounds
- Date of original construction and, if applicable, last renovation
- Number of floors and classrooms, and compliance with licensing regulations
- Staff access, grounds, and play areas
- Any restrictions on use
- Proximity to student residence (if applicable)
- Transportation of students (if applicable)
- Health, food, administration, library, storage, and teacher areas
- Short- and long-term facility needs and related costs
- Evaluation of environmental impact of school facilities and operations
- Map of campus
- Floor plan of facilities
- Photographs of school/campus/classrooms (optional)

STANDARD 7: FINANCES & STABILITY

The quality Montessori school:

7.1 Complies with all federal, state, and local regulations, as required by the school's legal status, and is verified by the AMS Independent Accounting Questionnaire.

**It is the school's responsibility to be aware of all these laws and regulations and to take steps to be and remain in compliance. It is not the responsibility of AMS or the Visiting Team to independently verify compliance. Accreditation by AMS is not certification of a school's compliance with applicable laws and regulations.*

7.1 Monitors all financial practices and transactions by engaging an external accounting firm or certified individual annually to review and report on the school's financial practices and financial status through one of these recognized accounting services: review, compilation, or audit.

7.1 Develops an annual operating budget that is approved by the governing body or owner.

7.1 Utilizes a system for accurately tracking and documenting revenue and expenses.

7.5 Reports on current year financial performance through the preparation of financial statements on a monthly or quarterly basis to the governing body or owner for oversight.

7.6 Clearly states and publishes financial responsibilities of parents (if applicable).

7.7 Maintains a written policy for managing, disbursing, and overseeing the allocation of funds awarded through its financial assistance program (if applicable).

7.8 Engages in financial planning for the long-term sustainability of the school.

SELF-STUDY DETAILS

Financial stability is imperative to a school's continued success. This section will detail how your school maintains strong and prudent financial management practices and adequate fiscal resources to support its mission and vision. This general overview of the school's finances does not require detailed financial documents/budgets. Some items to be included in the self-study are:

- Adequacy of funding sources
- Stability of revenues
- Source(s) of income (past five years)
- Comparison of income and expense (past five years)
- Distribution over budget categories
- Projections of expense (next five years)
- Projections of income (next five years)

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- Per-student expenses

STANDARD 8: RECORDS, RESOURCES, AND SUPPORT SYSTEMS

The quality Montessori school:

8.1 Develops and implements a published comprehensive health (physical and emotional) and safety plan, preventive/emergency preparedness plan, and crisis management plan.

8.2 Annually reviews, updates as needed, and shares with appropriate stakeholders the comprehensive health and safety plan, preventive/emergency preparedness plan, and crisis management plan. (Plans should reflect the date of the most recent review and/or revision.)

8.3 Ensures that staff are trained, as required by local and state authorities, to comply with all current local and state safety regulations, including provisions made to simulate events and practice the execution of health and safety policies and procedures.

8.4 Maintains records of scheduled, completed emergency drills.

8.5 Documents and reports student incident/accidents that occur during school hours.

8.6 Maintains insurance coverage: fire and extended coverage, comprehensive liability, workers' compensation, and director and officers' liability Insurance (if applicable).

8.7 Creates and publishes policies and procedures for field trips and off-site events that provide for the safety of the students including proper chaperoning and procedures for use of commercial and/or private vehicle transportation.

8.8 Maintains and distributes to staff students' emergency, health, and academic records at the site of attendance:

8.8.1 Ensures that all teachers, administrators, and appropriate staff members shall receive any and all necessary information about a student's disability-related needs, which may include a copy of a student's specialized education program, to ensure that disability-based accommodations and specialized instruction occur consistently throughout the student's day.

8.8.2 Provides a plan regarding retention of student records upon closing of the school that abides by state or local regulations.

8.9 Maintains on file and provides to families of students with disabilities, as necessary or requested, a list of professional support services and agencies in the community that are able to assist students with disabilities and families of students with disabilities.

8.10 Assists families in establishing connections with agencies, programs, and/or community resources that may be beneficial to the students with disabilities and/or their families.

8.11 Maintains employee records including Montessori credentials, licenses, teaching certificates, transcripts, evaluations, and background checks.

8.12 Has a policy for maintaining and backing up student, former student, and employee records and business files in accordance with all applicable federal, state, and local laws.

8.13 Ensures accessibility to all legal documents as required by federal state and local laws/regulations befitting the school's legal status.

SELF-STUDY DETAILS

Demonstrate that your school has appropriate documentation, training, and human resources to meet applicable federal, state, and local regulations; assure health and safety of faculty/staff and students; and enable all students to achieve expectations for student learning. Narrative should include information pertaining to:

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- Emergency preparedness plans and procedures
- Health and safety plans (allergy protocol, when to call 911, choking, etc.)
- Staff training for emergencies and government regulations
- Off-site (field trip) policies and procedures
- Description of how outside professional support contacts are provided for parents

STANDARD 9: STAKEHOLDER COMMUNICATION AND RELATIONSHIPS

The quality Montessori school:

9.1 Has formal channels described and outlined in a policy and procedures document to listen to and communicate with stakeholders.

9.2 Publishes a parent handbook that articulates policies and procedures relevant for students and families, including an anti-bullying statement, a student discipline policy, and a grievance procedure.

9.3 Solicits the knowledge and skills of stakeholders to enhance the work of the school.

9.4 Communicates, through multiple channels, the expectations for student learning, learner outcomes, school effectiveness, and goals for improvement to all stakeholders.

9.5 Provides the necessary tools that enable outreach and engagement to the school's families, including those whose first language is one other than the primary language spoken in the school.

9.6 Conducts annual assessments of school effectiveness with constituents, and analyzes and shares results.

9.7 Develops a written observation policy and encourages visits by parents and other community members.

9.8 Practices community engagement by providing information about school programs, and seeks ways to contribute locally.

9.9 Provides family support and enrichment opportunities such as workshops on Montessori philosophy and curriculum, parenting issues, child development, and health and safety issues.

SELF-STUDY DETAILS

Provide examples of how effective communication and relationships are fostered with and among your school's stakeholders. This should include a description of the school community and how they are engaged. Some examples could include:

- Description of the school's formal communication policies, excerpts from the parent handbook, and any published resources provided to families
- Any special talents/resources of parents or friends of the school and how they are cultivated to enhance the work of the school
- Any supporting clubs, associations, or affiliations and how those relationships are formed and maintained
- A description of the school's communication plan to articulate the expectations for student learning, learner outcomes, school effectiveness, and goals for improvement to all stakeholders
- Use of school facilities by other clubs or associations and how the policies of use are established
- How libraries, museums, galleries, and other such resources are used to support the school's mission

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INSTRUCTIONAL STANDARDS: STEP 8

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INSTRUCTIONAL STANDARDS: STEP 8

OVERVIEW OF THE INSTRUCTIONAL STANDARDS

To attain Step 8, a school must demonstrate that it is in compliance with the school accreditation standards and criteria outlined in Standards 3 and 4. Compliance with these standards demonstrates to your community that you continually examine the aspects of Montessori pedagogy and seek to implement it fully. Furthermore, it demonstrates that you actively measure the learning outcomes of a Montessori focus on human development and meeting the psychological needs of the child at every level of your Montessori programs.

STANDARD 3: TEACHING AND LEARNING—EDUCATIONAL NATURE

A quality Montessori school implements a Montessori curriculum based on clear and measurable learner outcomes. Students actively engage in the learning process, exhibit joy in learning, and apply their knowledge and skills to real-world situations.

Reflective of her developmental view, Maria Montessori saw education as having a particular focus at each stage of the student's development. The environmental experiences available to the student change at each developmental stage; however, the qualities of a Montessori education outlined in this standard remain consistent throughout each developmental plane.

All six qualities within this standard (Montessori learning environment, Montessori learning relationships, Montessori learning activities, Montessori spirituality, What the Montessori teacher is, and What the Montessori teacher does) should be addressed in the self-study **as they relate to each age level, with specific examples cited**. Narration for each quality should also include:

- Areas of strength
- Areas that need improvement

CRITERIA:

MONTESSORI LEARNING ENVIRONMENT

3.1 The quality Montessori environment:

- 3.1.1 Includes programmatically appropriate furnishings (tables, chairs, etc.) of appropriate size and quantity.
- 3.1.2 Is clean and orderly to promote student independence.
- 3.1.3 Has accessible storage area(s) for students' belongings.
- 3.1.4 Has a water source available as needed for independent student work.
- 3.1.5 Allows for a variety of activities such as individual/group, floor/table, noisy/quiet, and active/sedentary.

3.2 Instructional Materials

- 3.2.1 Classroom environments are equipped with the fundamental Montessori materials. Curriculum support materials that meet the needs of the student may be incorporated into the classroom, provided that they do not replace the primary use of the Montessori materials.

  A list of fundamental and other suggested materials for each age level is provided in the AMS School Accreditation Handbook. This guides quality Montessori schools in preparing and assessing environments and selecting materials for each age level.

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3.2.2 Classroom materials are aesthetically displayed and appropriately accessible to students.

3.2.3 Classroom materials are purposefully sequenced (generally left-to-right, top-to-bottom) according to the school's scope and sequence.

3.2.4 Schools inspect and evaluate materials regularly for completeness and good working condition, and keep a school-wide inventory of all instructional materials and furnishings, including a repair and replacement plan.

SELF-STUDY DETAILS: MONTESSORI LEARNING ENVIRONMENT

A Student-Centered Environment

The focus of activity in the Montessori setting is students' learning, not teachers' teaching. There should be a very limited number of whole-group lessons, appropriate to the particular students' levels of development. The narration should describe the school's practices in this regard.

A Responsive, Adaptive Prepared Environment

An environment responsive to students' emergent needs is one proportioned to their interests, abilities, and potential. It is both "prepared" in advance of the students' entry into it and "preparing" in its responsiveness to student need and evolving student interest. The narration should describe how the school prepares the learning environment and give examples of how it changes the environment in response to needs.

Self-Realized Competence

Within a Montessori setting, each student strives to achieve his or her fullest potential in a socialized context. The narration should present the school's approach to this.

MONTESSORI LEARNING RELATIONSHIPS

3.3 The school structures classes with Montessori multi-age groupings.* Program levels must be structured and staffed for the following multi-age groupings:

- Infant: within the range of birth – 18 months
- Toddler: within the range of 15 – 36 months
- Early Childhood: a 3-year age group within the range of 2.5 years – 6 years
- Lower Elementary: 6 years – 9 years
- Upper Elementary: 9 years – 12 years
- or Elementary I – II: ages 6 years to 12 years
- Secondary: the school must offer an age grouping of either 12 – 14, 14 – 16, 16 – 18 years of age or 12 – 15, 15 – 18 years of age.

3.4 School administrators and educators shall ensure that students with disabilities are educated with their non-disabled peers to the greatest extent appropriate, utilizing push-in supports and programs wherever appropriate. Students with disabilities shall be removed from the regular classroom setting for the provision of instruction and/or services only when necessary and individually appropriate.

SELF-STUDY DETAILS: MONTESSORI LEARNING RELATIONSHIPS

Multiage Grouping

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Multiage grouping is an integral part of Montessori philosophy at all levels. In order to respond to the variety of individual student's developmental needs, evidenced by a wide range of abilities in a particular age level (and as a reflection of Montessori's planes of development), classes typically group students across a three-year age span. The narration should give examples of how this is accomplished by the school and include classroom schedules.

Social Setting as a Community
The social setting is somewhat like that of an extended family. The emergent skills of individual students are harnessed for the good of the whole group. Students routinely demonstrate newly achieved competencies to one another. The narration should give examples of how this is done by the school.

Cooperation, Collaboration, NOT Competition
Students are encouraged to support one another in their efforts at mastery. The life of the group is the context in which individual activity is seen. By having students do the same thing at different times and different things at the same time, negatively construed comparisons among students are lessened, if not completely avoided. Montessori's developmental focus implies that all students will, over time, master the social system and the curriculum. The narration should describe how the school overcomes tendencies for invidious comparison and competitions.

MONTESSORI LEARNING ACTIVITIES

3.5 *Curriculum Design and Implementation of Instructional Programs*
The school provides a comprehensive Montessori educational curriculum based on Montessori's fundamental philosophy of the child and the Montessori planes of development, with clearly-defined learner outcomes. (See "AMS Montessori Program Characteristics Papers" in the *School Accreditation Handbook.*)

3.5.1 *Infant and Toddler (Birth — 3)*
The Infant & Toddler curriculum is based on 6 integrated developmental areas: sensory and perceptual, cognitive, physical, gross and fine motor, self-help skills, and social/emotional development. The learning environment fosters freedom of movement, integrates daily routines, and provides experiences that develop a child's growth and independence. Indicators of successful implementation include students engaging in daily activities based on their needs, capabilities, and interests.

3.5.2 *Early Childhood (2.5 — 6)*
The Early Childhood curriculum integrates the core areas of Practical Life, Sensorial, Math, Language, Peace and Cosmic Education, and Cultural Subjects. The learning environment is student-centered and self-directed. It promotes the development of order, coordination, concentration, and independence. Indicators of successful implementation include students engaging in self-directed learning and completing cycles of work independently.

3.5.3 *Elementary I (6 — 9) and Elementary II (9 — 12)*
The Elementary curriculum integrates the core subjects of Mathematics (including geometry and algebra), Biological and Physical Sciences, Technology, Language Arts and Literature, History, Physical and Political World Geography, Civics, Economics, Anthropology, Peace and Cosmic Education, Art, Music, Additional/World Language, and Physical Education. Individually-paced academic progress allows students to explore their interests and acquire the mastery of basic skills and knowledge. The learning environment is student- centered and designed to promote the development of organizational and time management skills, conflict resolution skills, concentration, independence, cooperation, and collaboration. Indicators of

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successful implementation include teacher guidance, assessment in planning in concert with student planning, monitoring, and assessing their own work, and demonstrating responsibility for their own learning and actions.

3.5.4 *Secondary I (12 – 14/15) and Secondary II (14/15 – 18)*
In addition to the core curriculum areas of Math, Language Arts, Social Studies, Science, Additional/World Language, and Creative Arts, the Secondary curriculum includes opportunities for community service, career exploration, economic awareness, technology, peace and cosmic education, physical education, outdoor education, and field studies. The curriculum prepares students for post-secondary education or careers through self-construction, extensive self-reflection, and opportunities for leadership and personal responsibility. Personality integration and stewardship of the Earth and humanity are crucial elements of the curriculum. Students' independent decision-making, problem solving, community building, and application of learning indicate successful implementation of the curriculum.

3.6 The school publishes and follows a written scope and sequence, across all program levels within the school, which is communicated to all constituencies.

3.7 The school provides uninterrupted work periods of a length appropriate to the age of students served, to support student learning. (See "The Montessori Uninterrupted Work Period" in the *School Accreditation Handbook.)*

3.7.1 Infant & Toddler: The school allocates and protects, at minimum, a daily 2-hour work cycle. The time block allows for adult-assisted mealtime, snacks, hygiene, and nap/rest routines.

3.7.2 Early Childhood: The school allocates and protects, at minimum, a 2-hour work cycle, 4 days per week. A 3-hour uninterrupted work cycle, 5 days per week is optimal.

3.7.3 Elementary: The school allocates and protects, at minimum, a 2-hour work cycle, 4 days per week. A 3-hour uninterrupted work cycle, 5 days per week is optimal.

3.7.4 Secondary: The school allocates and protects, at minimum, a 2-hour work cycle for core curricular subjects (math, English, history or humanities, sciences, and additional world language/s).

3.8 The school does not schedule enrichment programs, group snack, whole-group lessons, recess, and transition times during uninterrupted blocks of student work time.

SELF-STUDY DETAILS: MONTESSORI LEARNING ACTIVITIES

Firsthand Experience with Materials

Students learn by acting on their environments and need materials with which to interact. Materials should be provided to accommodate all developmental levels of the students in each environment. Models of relationships, which Montessori characterized as "materialized abstractions," should also be available, including variations and extensions of the materials. The narration should describe the school's provisions and practices in this regard.

Spontaneous Activity

Students spontaneously seek growth and development because it is in their nature to do so. The environment should provide spontaneous learning opportunities in which students can make meaningful connections, thereby building upon previous experiences. The narration should give examples of how this is provided.

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Self-Directed Active Learning Methods
The Montessori environment provides a setting in which students engage in self-selected learning activities. They initiate their work and persist in it until they have completed it to their respective criteria of completion. The student constructs his or her own intelligence, choosing his or her activity, fueled by their need to become competent. The narration should describe how this is accomplished.

Social/Emotional Development
The student constructs his or her own sense of self and moral reasoning through social interaction with others. The narration should give examples of this.

Liberty within Limits
The activity engaged in by a particular student in an environment, characterized by "liberty within limits," rests on the student's right to do what is normally and appropriately dictated by the particular culture and by the developmental level of the student. Narration should describe the school's treatment of liberty.

Intrinsic Motivation
The motivating force for learning in a Montessori environment comes from within the individual student. This drive toward competence is fueled by the student's curiosity and interest. Thus is the student's self-initiated activity considered its own reward? The narration should describe how the school activates and engages the student's curiosity and interest.

MONTESSORI SPIRITUALITY

The quality Montessori school:

3.9 Implements a curriculum that encourages the realization of Montessori's vision of a peaceful world.
3.10 Creates and follows policies that speak to the social and emotional health of the students.
3.11 Engages students in environmental stewardship and sustainability activities to foster Montessori's vision of maintaining the planet.

SELF-STUDY DETAILS: MONTESSORI SPIRITUALITY

The Child as a Spiritual Being
Montessori saw the student as a spiritual embryo developing according to a definite plan. The developing child not only acquires "strength, intelligence, and language; but, at the same time, he adapts the being he is constructing to the conditions of the world about him." The narration should include how the school responds to Montessori's view of the spiritual development of its students.

WHAT THE MONTESSORI TEACHER IS

The Montessori teacher is:

3.12 One who demonstrates knowledge and internalization of the core beliefs of Montessori philosophy, such as respect for the individual learner; preparation of self and the environment; fostering independence, order and concentration in the student; respect for and recognition of sensitive periods, planes of development, intrinsic motivation of the student, and the absorbent mind.
3.13 One who demonstrates fundamental communication skills to support the social and emotional development of students and to communicate with parents about student's social/emotional and academic progress.

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SELF-STUDY DETAILS: WHAT THE MONTESSORI TEACHER IS

Authoritative

The teacher maintains limits and expectations through mutually respectful and constructive interactions with students. The teacher responds empathetically to students' feelings, taking into account their social/emotional well-being and development. The narration should describe how the teachers relate to students in regard to limits, expectations, and empathy.

Observer

Observations should be systematic and disciplined. Observers should keep in mind that Montessori's own considerable powers of disciplined observation contributed greatly to her powers as an educator (Stoops, 1989). The teacher learns of the students' interests, intentions, and developmental needs through regular observations. These observations must be carefully recorded and analyzed to guide the student through each plane of development and to provide learning opportunities in all curricula areas. The narration should address the methods/systems and frequency of the teachers' functioning as observers. Include examples of how observations are recorded, analyzed, and used to meet the needs of the students.

Resource/Consultant

The teacher is one of the resources providing support to students as they acquire and construct knowledge through activities and use of materials. The narration should describe the roles, responsibilities, and practices of the teachers at each level.

Model

The teacher is a model to the students in a Montessori environment, not only in behaviors but also in attitude and habits of mind. It is the teacher who sets the tone of how students strive for success, problem solve, think critically, take cognitive/social/emotional risks, and are inspired to learn. Narration should indicate how a teacher models valued traits throughout the school.

WHAT THE MONTESSORI TEACHER DOES

The Montessori teacher:

3.14 Designs and uses instructional strategies, innovations, and activities that are observation- and research-based, meet student needs, and reflect Montessori best practice.

3.15 Promotes active involvement of students in the learning process.

3.16 Provides for a balance of uninterrupted, self-directed, self-teaching, and collaborative activities with the presentation of individual, small-, and large-group lessons.

3.17 Implements and keeps clear, written records of individual, small-, and large-group lessons and activities and uses a comprehensive record keeping system that accurately reflects each student's development.

3.18 Observes the overall classroom environment during individual lessons and records observations.

3.19 Supports students in assessing their work as developmentally appropriate.

3.20 Uses various methods of communication to discuss student development with parents.

3.21 Implements accommodations and interventions to help students meet expectations for student learning, in consultation with school administrators and parents.

3.22 Recognizes and provides opportunities for students to participate in meaningful, age-appropriate leadership activities.

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SELF-STUDY DETAILS: WHAT THE MONTESSORI TEACHER DOES

Respectfully Engages with Learner

The teacher is mindful of her/his awesome responsibility in facilitating the cognitive and moral development of those in her/his charge. S/he sees the responsibility in terms of individual student's needs for optimal development and of the need to create an intentional community. The narration should describe how teachers facilitate each student's development and how that contributes to the classroom/school community.

Facilitates "Match" between Learner and Knowledge

The teacher knows the most appropriate response to the individual learner's need wherever the learner is in his/her acquisition of new knowledge. The narration should describe what informs the teachers' knowledge of potential meaningful connections that can fulfill individual learner's needs.

Designs/Organizes/Prepares Environment

The teacher designs the environment, addressing the various levels of social, cognitive, and physical development and ability, reflecting through the curriculum the culture of the students. The narration should express what elements the teachers consider in environmental design and examples of how these elements are incorporated.

STANDARD 4: DOCUMENTING AND USING RESULTS—LEARNER OUTCOMES

In a quality Montessori school, the administrative leader, faculty, and staff collaboratively:

4.1 Determine written benchmarks across all program levels that indicate progress toward the following learner outcomes: academic preparation, autonomy and independence, confidence and competence, global citizenship, intrinsic motivation, social responsibility, and spiritual awareness/cosmic education.

4.2 Create, publish, and implement a data-driven system including qualitative (rubric-based) and quantitative measures (as appropriate to the age level) to assess student progress toward the established learner outcomes.

4.3 Analyze this recorded data, action research, and classroom observations to examine each student's physical, social-emotional, and cognitive development.

4.4 Use the analysis of this data to make curricular and instructional decisions for individual students.

4.5 Evaluate school-wide effectiveness in meeting established benchmarks using compiled student data.

4.6 Use the results of a systematic analysis of instructional effectiveness to drive continuous improvement of teaching and learning processes.

SELF-STUDY DETAILS

How do we know if the Montessori approach is working? The subcommittee working on The Educational Nature of the School section describes how the method operates. Their narration describes how the educational methods endeavor to attain Montessori outcomes, such as social responsibility, intrinsic motivation, independence, etc. The narration about the learner outcomes must describe how these outcomes are observed. In other words, *What must an observer see to know the educational methods of the school are working?*

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Learner outcomes can be seen as process as well as product in Montessori settings. Montessori educators have always reflected on the dilemma of distinguishing the difference between the two. Completing this section will help the school evaluate the assessment and evaluation methods and strategies it uses.

In all outcome areas, there are developmental "milestones" that can serve as indicators of progress. The school may use different data collection instruments to determine the outcomes of its program in relation to these milestones. Surveys and observation rubrics are instruments that have been used by many schools. These schools have used various groups of individuals to collect the information on the surveys: parents observing classes other than their own student's class, teachers in the same school observing each other's classrooms, Montessori teachers from a neighboring school and/or educators from nearby non-Montessori schools observing in the classroom. The survey or observation rubric is used by an "outside observer to the classroom" so the student's observable behaviors can be verified by individuals able to give objective feedback to the school.

Attainment of some behaviors is not measured by conventional tests. The only way to discover them is through observing the student's behaviors while in school and by following up on life behaviors. How do we discover if the student exhibits these behaviors in times and places apart from the school activity that engenders it? The answer is that we must learn to observe it in other in-school activities and learn to observe it in the student's life outside of school.

In addition to observation, other methods used to collect data may include but are not limited to: surveys, portfolios, interviews with students, teacher/student conferences, norm-referenced test scores, teacher and student journals, photographic evidence, and student self-assessments. The subcommittee on Learner Outcomes collects "evidence" from the data collection instruments it chooses to use and documents it in the narration for this section of the self-study.

In light of the importance of schools being accountable for student outcomes, the completion of this section will be very helpful in addressing issues of assessment. It is recommended that schools use this self-study to evaluate their commitment to systematic observation, documentation, and accurate reporting of students' behaviors and learning.

Educators know the results they want and what it takes to accomplish them, but they are often criticized for an inability to document that they *are* accomplishing them. Evidence of outcomes makes a conclusive statement to the lay public of the success of Montessori education. All educators must improve upon the ways they document, examine, and report outcomes. Evidence of outcomes of Montessori learners is crucial for greater acceptance of the Montessori approach to education by the general public.

For this reason, it is recommended that Montessori schools follow the progress of their students as they move into other kinds of schooling, and even into later life. Without the insight that comes from follow-up and longitudinal study, the enduring character of Montessori outcomes can only be a matter of speculation. All that can be known about lifelong effects are inferences drawn from observed changes of in-school behaviors. As good as this may be, it is not enough.

The narration on outcomes concludes with two self-reflective assessments: one which reveals what the school does well in regard to each outcome and another which indicates how the school can improve those same outcomes.

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The narration should also address the following qualities of Montessori learners **at each age level served by the school and cite specific examples of how these qualities are evidenced in classroom and school-wide activities.**

ACADEMIC PREPARATION

In Montessori education, students learn to learn by doing. Academic preparation entails activation and cultivation of inherent powers and processes through which the learner becomes a supplier of meanings or of things meaningfully known. Academic skills are essential to learning and knowing, not the aim of learning and knowing. Do students acquire academic skills and apply them to their learning strategies?

Montessori called her didactic apparatus "materialized abstractions." In her view, when students manipulated these materials, they achieved first perceptual and then cognitive understanding. Although the teacher models ways to work with these materials, Montessori herself envisaged students exploring them, based on her understanding that "things have an infinity of attributes" and reveal ever-new relations to the students in successive interactions. Because the materials and activities function as an embodiment of cultural expectations, students in Montessori settings successfully master the appropriate curricula. The narration should include how the school's curricula meet state and/or national standards.

AUTONOMY AND INDEPENDENCE

Grace and Courtesy in the classroom contributes to the students' understanding of each individual's desire to work alone or with others. Are students able to hone their collaboration, cooperation, and negotiation skills in working through choices of work partners? Can the student accept or reject inclusion in another student's work or work group with equanimity? These observable skills are evidence of students' autonomy.

The social and physical organization of the Montessori class as well as the mediating behavior of the teacher promote individual student's *independence.* Narration should include confirmation that the environment and the teacher do promote independence. Freedom within limits in a prepared environment is encouraged through self-selection of opportunities for constructive work, care of environment, care of self, the development of inner discipline, internalization of the work cycle/strategies, and assimilation and accommodation of learning and metacognition (thinking about thinking).

Introduction of the materials to the students involves every step of the work cycle. Choosing a material, working through completion, and returning and readying it for the next student encourage and model independent behaviors. This "completed cycle of activity" is easily observable. A student who is independent knows how to make appropriate decisions regarding when to work alone or when to work within a small or large group.

Is the student able to choose his or her own work, apply energy to that work, complete it to a personal criterion of completion, and take and return the work to its proper place in such a way that another student will be able to find the work ready to do? Does the student learn through errors encountered in use of the self-correcting materials? Is the student able to seek help? Does the teacher encourage use of other resources and other students as sources of help? Is the student able to locate resources to continue the self-chosen task without necessarily involving the teacher?

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CONFIDENCE AND COMPETENCE

Confidence is built upon success. In a Montessori environment, there are many occasions for success. Respect for the student's efforts and the realization that the student constructs his or her own intelligence guard against teachers forming premature judgment regarding the quality of the student's efforts. It can be intimated that a student growing in success is growing in confidence. Cite examples of how the students are experiencing enough success to warrant the conclusion that they are growing in confidence. Are the student's self-perceived successes far more numerous than his or her self-perceived failures? Is the student capable of self-correcting work upon observation, reflection, or discussion? Can the student manage the available array of tasks and activities with a clear sense of purpose?

GLOBAL CITIZENSHIP

From the earliest experiences of negotiating and adjusting one's behavior with other students through attention paid to the ways of people of various cultures, Montessori education guides students to move far beyond the family and school, toward global citizenship. Personal responsibility is configured in successively broader terms to include an awareness of the importance of stewardship of the planet, work that guides children to harmonize with all living things and create an ever-better world.

All students are part of both a world political system and a world ecological system. Both systems have their own constitutions, and all beings must learn to live by the letter and spirit of their laws. As a naturalist, Montessori knew about the laws of man and of nature and understood the consequences of disobeying either of them. What are the global citizenship outcomes of school experience? Are the students acquiring civic virtue? Are they acquiring an understanding of the natural world and of the necessity to cherish it, respect it, sustain it, and live harmoniously within it?

INTRINSIC MOTIVATION

The "work" is its own reward in a Montessori class. External rewards and other forms of praise or evaluation undermine the student's development of intrinsic motivation. The teacher should encourage the student's work through recognition or acknowledgment of elements of the work. Teachers should also encourage students to reflect on their work.

One should see no physical or extrinsic motivations, such as gold stars, stickers, or stamps on the students' work, nor hear words of verbal praise, such as "good job" or "I like that." Students doing things for their own sake or doing things well for the sheer joy of doing things well are more focused on their own accomplishments and develop self-esteem and a sense of dignity. The teacher's role is to discern why the child is doing things. If the student constantly turns to the teacher or others for approval, the motivation is probably not intrinsic.

Is the student drawn to continue working for the apparent pure pleasure of doing so? Does the student, once having achieved a particular competence, show confidence in accomplishments by showing others?

SOCIAL RESPONSIBILITY

Children in Montessori classes are "free" within the carefully crafted, mutually agreed-upon limits of the group. These limits are articulated over the course of the school experience through clearly defined ground rules that are modeled by the teacher and the students. The physical organization of the classroom contributes to the successful conformance to the ground rules by all members of the

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classroom community. Social responsibility develops from the student's willful adherence to and enforcement of ground rules.

Independence and autonomous persons are always a part of a group and must attain independence and autonomy through participation in group activity. The loss of these qualities by one of a group is a loss for everyone. Do students attain independence and autonomy and, at the same time, develop social responsibility?

SPIRITUAL AWARENESS/COSMIC EDUCATION

Montessori's distinctive notion of the child as a "spiritual embryo" emphasized her key principle that the growing human being is not simply a biological or psychological entity but a spiritual energy-seeking expression in the form of a human body within the physical and cultural world. The child as spiritual embryo guided by spiritual energy thrives on encounters with the world as she/he develops into adulthood.

How does the school develop awareness of ecology of existence, which gives every living thing a meaningful function in the larger system? How is each student encouraged to make his or her own unique contribution to the cosmic plan, to fulfill his or her own destiny? How does the school cultivate each student's spiritual sensitivity and allow for emergence of each student's own inherent nature?

THE ONSITE VISIT

If your school opts not to become accredited, an onsite visit will take place by a peer validator to verify your placement at Step 8 on the AMS Pathway.

We will partner with you to locate a peer validator, whose task is to validate the school's self-study report, including required standards and criteria, and to write a report detailing findings and conclusions that will allow AMS to award the Step 8 quality seal and to give your school additional feedback in your plans for continuous school improvement.

The peer validator will put their results in a report that contains meaningful findings and conclusions that will invigorate the school improvement process. The peer validator reports to the Pathway consultant, the AMS Office of School Accreditation, and to the school.

Who are peer validators?

Peer validators are teachers and administrators, with specific knowledge of the AMS accreditation standards, who volunteer to serve our member schools. Team members are selected for their educational and/or administrative experience, their ability to provide meaningful and objective judgments about the school's program, and their writing ability. Peer validators must also meet the following requirements and be free of any conflict of interest with the school:

- (Teachers) hold a qualifying Montessori credential
- (Teachers) have a minimum of three (3) years teaching experience, not including practicum
- (Heads) have a minimum of three (3) years of experience as the head of an AMS Pathway school
- Be current AMS members
- Complete AMS peer validation training
- Does not have any conflicts of interest (see form supplied by Pathway consultant)

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A person with a recognized area of expertise who does not meet the above team member's criteria may be asked to serve at the discretion of the AMS office.

Potential validators can be either chosen by the head of school as per the requirements above or located by the AMS Pathway office. If there is not an eligible peer validator available from within the same geographic area as the candidate school, then we have the option of a virtual visit. Ask your Pathway consultant for details.

Who trains the peer validators?
Training is available through the AMS Office of School Accreditation, via webinar.

How many members are on a team?
If your school has more than eight classrooms or 150 students, either two peer validators will be required for the visit or the visit may take more than one day to complete with one validator. You will work with your Pathway consultant to decide which is the best choice for your school.

What is the role of the peer validator?
The peer validator's task is to validate the school's self-study. The validator does this work by observing all classes and special programs, reviewing documentation that validates the AMS standards, and interviewing a few key members of the school's constituents. Following the visit, the peer validator will submit a report to your Pathway consultant, and they will confer on your eligibility for placement at Step 8 on the Pathway. The report and its findings will be made available to you, along with any further direction for what must be done to attain Step 8 or notification that you have been validated as a Step 8 school.

How do we prepare for the peer validation visit?
Your Pathway consultant will provide support on questions you have about preparation for the visit, but, by and large, you should simply plan a regular school day, without any significant interruptions like off-site field trips, etc.

The school is sent, via email, a copy of the team roster, which lists the contact information for the team chair and each of the team members. The school will want to be in close communication with the team chair to discuss specific information about preparations for the visit.

Preparations will include the following:

- Tour of school
- Any relevant orientation materials (classroom schedules, faculty/admin roster, school floor plan)
- Any travel or lodging arrangements for peer validator(s)
- Files of required documents, organized and easily accessible—it is recommended that they be stored electronically (such as on Google Drive or Dropbox)

What happens during the visit?
The peer validator's task is to validate the school's self-study. The team does this work by observing all classes and special programs, reviewing all documentation that validates the AMS standards, and interviewing a few key members of the school's constituents.

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Who will the peer validator want to speak with?
The peer validator will want to speak with the school leader, perhaps another administrator (if applicable), a board member (if applicable), and a cross section of teachers.

What can we expect from the report—and do schools receive a copy?
The report represents the findings and validations of the peer validator. Approximately 3–4 weeks after the visit, your Pathway consultant will send a copy of the report to the head of school.

What do we do with the report? Can we quote from it?
The peer validator report is a document intended for use only by the AMS Pathway consultant to determine validation of Step 8 on the Pathway.

It is the policy of AMS that the peer validator report be treated as a confidential document, to be used for strategic planning purposes by the school. Final copies of the document are submitted to the AMS Pathway consultant and to the head of the school. Beyond this distribution, no one—including the peer validator or AMS office—is authorized to release any of the information contained in the report without the express approval of the head of the school.

This report is intended for use by the administration, faculty, and governing body of the school. It is not written for the purpose of providing a public relations document. If a school uses the report in a manner that misrepresents or distorts its contents or purpose, the school will be subject to corrective action by AMS.

The charge of the AMS peer validator is to determine the actual situation as it existed in the school—its programs and procedures—and not to pass judgment on the professional personnel involved. Hence, this report is an objective description of circumstances as they appeared to a trained and experienced Montessori educator. Any use of this report as an official assessment of a staff person's professional competency would be in violation of the professional ethics under which a school evaluation is conducted.

If there are any questions regarding the peer validator's report or its appropriate use, please contact your AMS Pathway consultant.

Will the teachers get feedback?
Onsite observations are focused on process, standards, and the school's self-described program and strategic plan, not on individual teacher performance or individual classrooms. A peer validator is observing to verify that the school is what it says it is and does what it says it does and to help the school discover any issues not addressed in the self-study and strategic plan. Therefore, the feedback will address broad issues and not issues specific to individual teachers.

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CONTINUOUS IMPROVEMENT: STEP 9

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CONTINUOUS IMPROVEMENT: STEP 9

OVERVIEW OF STEP 9

To attain Step 9, a school must demonstrate that it is in compliance with the school accreditation standards and criteria outlined in Standard 2. The goal of a school working on Step 9 of the Pathway is to produce a strategic plan. Thus, the school will examine the sum of their work in identifying strengths and areas for improvement in previous Pathway steps and translate these into a long-range plan that serves to focus the school on goals—and objectives and strategies to meet them—prioritized on a year-by-year basis. The plan should be created with at least a 3-year horizon.

STANDARD 2: CONTINUOUS IMPROVEMENT—STRATEGIC PLAN

The governing body together with school leadership:

2.13 Ensures that plans for continuous improvement are aligned with the mission and vision of the school and the expectations for student learning.

2.14 Engages stakeholder groups in a continuous process of improvement that results in a written multi-year strategic plan.

2.15 Includes in its strategic plan the following: goal statements, person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal, and financial implications.

2.16 Uses its strategic plan to guide its work.

2.17 Annually monitors, evaluates, and updates in writing the progress made toward the goals outlined in the strategic plan.

2.18 Annually communicates the progress and results of improvement efforts to stakeholders.

SELF-STUDY DETAILS

Strategic planning is a school's process of defining its vision and goals and deciding on allocation of its resources to pursue these goals, including its capital and community. In other words, strategic planning determines where a school is going over the next few years, how it's going to get there (action plan), when various stages will be reached (timeline), what resources will be available/allotted to reach each goal (budget), and who/which group will oversee the progress (point person). Strategic planning focuses a school's energy and aligns decision making. Many schools seek the assistance of an outside consultant to help make the process more meaningful.

If the subcommittees have prepared their reports and have used this information to discover the strengths and needs of the school, the strategic plan will emerge. The art of consensus building is especially important in creating a strategic plan. If goals are to be realized, all stakeholders must agree. Typically, the board and head of school engage in the strategic planning process, with the level of participation of the school community determined by the board.

Many schools have strategic plans in place at the time they enter the school improvement process. These plans may be used but will likely be modified due to the data collected by the subcommittees and any feedback offered by the peer validator.

Based on the school's mission statement, each subcommittee uses the information gathered during the process of the self-study to create specific goals. The Standard 2 narrative should address:

- How the planning process was organized and managed

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- The group(s) that were involved and what the group(s) did
- The techniques/procedures used in identifying the school's strategic goals
- The individuals or agencies responsible for the implementation of the plan
- Strategic merits of the plan (i.e., in what ways will this plan result in school-wide development as believed desirable?)
- Who approved the plan on behalf of the school

In a strategic plan, the goals should be few in number. Focusing on well-chosen goals will direct the energies of the school on objectives that can be attained. The plan should include one, two, or three things a school can do that will most advance its mission. Strategic actions must have school-wide impact. The strategic merit of a goal corresponds to the advancement of the school's mission resulting from its attainment. Actions that favorably affect the school's mission are worthiest of consideration. Obviously, they will always have school-wide impact and will not deal with narrow or isolated concerns. Strategic goals should be realistic, necessary, and perhaps interconnected to one another. "Strategic" is defined as anything that positively or negatively affects the long-term viability of the school.

For each goal statement, there should be:

- The objective
- Strategies/initiatives: The methods or action steps used to accomplish the objective; these may be broken down into smaller incremental action steps in a more detailed implementation plan
- Limits of the action: States what the status is now and what the status will be when the goal is attained in measurable, rather than vague, terms (i.e., the outcome)
- Implementation plan, including what, who, when, and cost:
    - Time of action: Reasonable deadline for attainment of a goal, taking into account urgency; what is acquired to attain it; and if the goal is developmental, requiring continuity of effort over a number of years
    - Persons responsible for achieving the goal and/or assessing work toward the goal
    - Financial implications: Funding needed to accomplish the goal, if necessary, and the source of funding
    - Method(s) of monitoring progress

Creation and approval of the strategic plan is not the end of the process; rather it is just the beginning. Strategic planning is a journey, not a destination. Data gathering and analysis, along with regular monitoring of progress toward the goals, are vital throughout the term of the plan. Implementation and process toward goals must be monitored by leadership.

If this is your school's first strategic planning process, we highly recommend delving deeper into resources to guide the process.

For additional information regarding strategic planning:

Board Source, www.boardsource.org

Driving Strategic Planning: A Nonprofit Executive's Guide
Strategic Planning: Understanding the Process E-Toolkit
Strategic Planning Workbook for Nonprofit Organizations

Independent School Management, www.isminc.org

The ISM Strategic Planning Book

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National Association of Independent Schools, www.nais.org

A Trustee's Primer on the Strategic Process

The Strategic Process: 10 Steps for Planning Your Independent School's Future

North American Montessori Teachers Association, www.montessori-namta.org

The Whole-School Montessori Handbook, (NAMTA, 1999), and *Supplement 2007*

PROFILE OF THE SCHOOL

The profile of the school is a comprehensive narrative of who the school is, where and how it began, and where it is today, including a description of its legal identity. In writing this section of the self-study, the school should refer to the descriptions below and personalize the narrative to fit the school's community. This section needs to record an accurate and thorough description of the school's legal composition and report data concerning the makeup of the school community.

This section is captioned by three major headings:

1. The Legal Personality of the School
2. The Students, Families, Staff, Faculty, and Community
3. The Facilities and Finances

This section is an opportunity to tell us who you are as a school community. In the sections to follow, you'll go into further detail about your alignment with the standards as well as your self-identified areas of strength and areas for improvement in relation to them.

Legal Personality of the School

In this section, the narrative includes a thorough history of the school as well as the legal identity. It will give details of the school's legal status—including if it is private, public, magnet, charter, not-for-profit, for-profit, sponsored, denominational, franchise, unincorporated, or cooperative—and the details of how it is managed and operates.

This section should include:

1. A history of the school, including how and when it was established
2. Size of the school(s)/district
3. How the school is governed
    a. How the governing body is appointed/elected
    b. Specifics of authority/oversight responsibilities
4. If the property is owned or leased
5. Chartering authority (license)

Depending on your school type, include the following areas as applicable:

1. Terms of your charter/public/magnet agreement
2. Ownership specifics
3. Dissolution clause
4. Adequacy and currency of bylaws
5. Level of profit
6. Disclosure of any conflicts of interest
7. Provisions made for school assets to remain with the school
8. Nature of sponsorship, relationship/involvement with school
9. Income diverted to/from sponsor

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10. Franchise fees and services
11. Franchise involvement in quality control

The Students, Families, Staff, Faculty, and Community

The narration in this section includes general demographics of enrolled students and families and the relationship of these demographics to those of the geographic community. Ways in which the school supports parent education should be described in this section. Community resources available to the school, especially those that can support the school's educational endeavors, should be briefly described. Libraries, museums, musical groups, parks, and play areas are included in the profile of the school.

A. Students

A student population should be described as it relates to size, ages, ethnicities, genders, special needs, languages spoken, and any other demographics that may be special to your school. Also included in this section are the programs and culture you have in place to ensure that the needs of your diverse community are being cared for. For example, a proportion may speak a home language different from that spoken at school; a proportion may be court-placed; a proportion may require before- and after-school supervision, special transportation, special medication, special diet, counseling, or other school services.

Narration should include:

- Demographics of the student body
- Information on enrollment (including enrollment of past three years and projections for enrollment for upcoming three years)
- Range of learner outcomes
- Need for special services and services provided

B. Families

Since education is always a cooperative school and family enterprise, narration should include general demographic information, such as:

- Employment (estimated % managerial, professional, technical, clerical, unemployed, etc.)
- Cultural unity/diversity (broad cultural characteristics and subcultures, etc.)
- Income levels (estimated % low, middle, and high)
- Parent education
- Percentage of scholarship applicants and recipients (if applicable)

C. Staff and Faculty

The narrative should include the numbers and description of staff and faculty.

Narration should also include:

- Administrative staff
- Full- and part-time classroom teachers
- Full- and part-time teaching assistants
- Personnel (custodial, food, health, transportation)
- Psychologists and/or counselors
- Area specialists (reading, physical education, music, art, library, conflict resolution, etc.)
- Montessori teacher credentials and degrees earned

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- Professional development for staff
- AMS membership status of lead teachers

D. Community

This section describes the support provided by the various constituents of the school community and the services and resources available within the local community.

Narration should include:

- Any special talents/resources of parents or friends of the school
- Use of school facilities by other clubs or associations
- Any special defining features/interest
- Libraries, museums, galleries, and other such resources utilized by the school
- Any supporting clubs, associations, or affiliations
- Other competing schools or educational alternatives

E. The Facilities and Finances

The self-study report must fully describe the facilities used by the school and must show the financial health and long-term stability of the school. Financial statements, balance sheets, budget projections, and actual budgets should be available onsite for the visiting team to verify.

Narration should include:

Facilities

- Description of buildings and grounds
- Date of original construction and, if applicable, last renovation
- Number of floors and classrooms and compliance with licensing regulations
- Staff access, grounds, and play areas
- Any restrictions on use
- Proximity to student residence (if applicable)
- Transportation of students (if applicable)
- Health, food, administration, library, storage, and teacher area
- Short- and long-term facility needs and related costs
- Evaluation of environmental impact of school facilities and operations
- Map of campus
- Floor plan of facilities
- Photographs of school/campus/classrooms (optional)

Finances

- Adequacy of funding sources
- Stability of revenues
- Source(s) of income (past five years)
- Comparison of income and expense (past five years)
- Distribution over budget categories
- Indebtedness (if any)
- Projections of income (next five years)

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- Projections of expense (next five years)
- Per-student expenses

*Actual budgets and audited statements need not be included in the self-study.

AMS SCHOOL IMPROVEMENT AND ACCREDITATION CONTACT INFORMATION

If you have general questions about AMS Pathway of Continuous School Improvement:
Contact Jen Harris, Pathway Manager at jenharris@amshq.org or pathway@amshq.org
Peter Piche, Pathway Consultant peter@amshq.org.

If you have general questions about AMS school accreditation or to obtain forms:
Contact Shannon Rogers, Manager of School Accreditation shannon@amshq.org.

If you have specific questions about AMS school accreditation (self-study requirements, cooperative accreditation, preparing for the onsite visit, etc.):
Contact Melanie Thiesse, Director of School Quality and Accreditation melanie@amshq.org.

American Montessori Society
Office of School Accreditation
116 East 16th Street
New York, NY 10003
212-358-1250 (p)
212-358-1256 (f)
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AMERICAN MONTESSORI SOCIETY

education that transforms lives

Revised 8/30/18

AMS School Accreditation Standards and Criteria

Effective July 1, 2018
Updated June 13, 2019 (Standard 5.2)

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AMS PATHWAY HANDBOOK

STANDARD 1: PHILOSOPHY, MISSION, AND VISION

The quality Montessori school's mission and vision are student-centered and guided by Montessori philosophy. The school establishes and communicates a shared philosophy that informs all facets of the school's culture, daily operations, and instructional decisions.

CRITERIA:
The quality Montessori school:

1.1 Creates written mission and vision statements with input from stakeholder groups.
1.2 Publishes a written non-discrimination policy that addresses race, color, religion, sex (including gender identity, sexual orientation, and pregnancy), national origin, age (40 or older), socio-economic level, physical ability or genetic information, and learning style.
1.3 Develops and updates a demographic profile of the school, its students and faculty/staff, and the community.
1.4 Communicates the mission and vision to build stakeholder understanding and support.
1.5 Reviews the school's mission and vision annually to ensure alignment with its educational goals and philosophy.
1.6 Has created and continues to foster a program, culture, and inclusive community of students, families, faculty and staff, and governing body (if applicable), that embraces diverse perspectives, cultures, backgrounds, and identities.

STANDARD 2: GOVERNANCE, LEADERSHIP, AND CONTINUOUS IMPROVEMENT — Strategic Plan

The quality Montessori school promotes student learning and school effectiveness through strong governance and leadership that is aligned with the school's mission and vision. It establishes, implements, monitors, and refines a strategic planning process to demonstrate continuous improvement.

GOVERNANCE

CRITERIA:
The governing body…

2.1 Establishes written policies and procedures that provide for the operation of the school and for the short- and long-term sustainability of the governing body and school leadership.
2.2 Functions as the strategic, policy-setting body and delegates responsibility to the head of school/principal/executive director ("administrative leader") for implementation of the strategic plan and all school operations.
2.3 Provides support to and evaluation of the administrative leader.
2.4 Provides an organizational chart that clearly defines roles, lines of authority, relationships, and accountability.

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2.5 Is knowledgeable of and complies with applicable federal, state, and local laws, standards, and regulations. (If the school is exempt from licensing or compliance, written documentation verifying the exemption is required to be kept on school grounds.)
2.6 Adheres to all applicable laws and regulations related to the education of students with disabilities.

LEADERSHIP

CRITERIA:
The administrative leader...
2.7 Promotes a culture of participation, responsibility, and ownership.
2.8 Provides opportunities for collaboration among stakeholders to make the school's mission and vision a reality.
2.9 Seeks and responds to school community concerns in order to clarify expectations and to strengthen stakeholder commitment.
2.10 Institutes, publishes, and facilitates systems that promote consistency and continuity of the curriculum within and across program levels.
2.11 Employs a system that analyzes learner outcomes and school effectiveness.
2.12 Ensures oversight of curricular and extracurricular activities that are sponsored/offered by the school.

CONTINUOUS IMPROVEMENT — Strategic Plan

CRITERIA:
The governing body together with school leadership:
2.13 Ensures that plans for continuous improvement are aligned with the mission and vision of the school and the expectations for student learning.
2.14 Engages stakeholder groups in a continuous process of improvement that results in a written multi-year strategic plan.
2.15 Includes in its strategic plan the following: goal statements, person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal, and financial implications.
2.16 Uses its strategic plan to guide its work.
2.17 Annually monitors, evaluates, and updates in writing the progress made toward the goals outlined in the strategic plan.
2.18 Annually communicates the progress and results of improvement efforts to stakeholders.

STANDARD 3: TEACHING AND LEARNING — Educational Nature

A quality Montessori school implements a Montessori curriculum based on clear and measurable learner outcomes. Students actively engage in the learning process, exhibit joy in learning, and apply their knowledge and skills to real-world situations.

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CRITERIA:

Montessori learning environment:

3.1 The quality Montessori environment:

3.1.1 Includes programmatically appropriate furnishings (tables, chairs, etc.) of appropriate size and quantity.

3.1.2 Is clean and orderly to promote student independence.

3.1.3 Has accessible storage area(s) for students' belongings.

3.1.4 Has a water source available as needed for independent student work.

3.1.5 Allows for a variety of activities such as individual/group, floor/table, noisy/quiet, and active/sedentary.

3.2 Instructional Materials

3.2.1 Classroom environments are equipped with the fundamental Montessori materials. Curriculum support materials that meet the needs of the student may be incorporated into the classroom, provided that they do not replace the primary use of the Montessori materials.
A list of fundamental and other suggested materials for each age level is provided in the AMS School Accreditation Handbook. This guides quality Montessori schools in preparing and assessing environments and selecting materials for each age level.

3.2.2 Classroom materials are aesthetically displayed and appropriately accessible to students.

3.2.3 Classroom materials are purposefully sequenced (generally left-to-right, top-to-bottom) according to the school's scope and sequence.

3.2.4 Schools inspect and evaluate materials regularly for completeness and good working condition, and keep a school-wide inventory of all instructional materials and furnishings, including a repair and replacement plan.

Montessori learning relationships

3.3 The school structures classes with Montessori multi-age groupings.* Program levels must be structured and staffed for the following multi-age groupings:

- Infant: within the range of birth – 18 months
- Toddler: within the range of 15 – 36 months
- Early Childhood: a 3-year age group within the range of 2.5 years – 6 years
- Lower Elementary: 6 years – 9 years
- Upper Elementary: 9 years – 12 years
- or Elementary I – II: ages 6 years to 12 years
- Secondary: the school must offer an age grouping of either 12 – 14, 14 – 16, 16 – 18 years of age or 12 – 15, 15 – 18 years of age.

A "bridge" program between Toddler and Early Childhood does not satisfy this criterion.

**Schools with a multi-age grouping variance listed in the document "Grandfathered Multi-Age Grouping Variances 2014" (dated October 3, 2014) are grandfathered such that they may maintain the age-grouping(s) for which the variance was granted. The accreditation status of these schools must be noted in their listing on the AMS website and in all other AMS accredited school listings, as well as in the schools'*

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own marketing materials. The exact wording that must be used is: "Accredited with non-traditional Montessori age groupings." Failure of a school to comply with this language will result in revocation of AMS accreditation.

3.4 School administrators and educators shall ensure that students with disabilities are educated with their non-disabled peers to the greatest extent appropriate, utilizing push-in supports and programs wherever appropriate. Students with disabilities shall be removed from the regular classroom setting for the provision of instruction and/or services only when necessary and individually appropriate.

Montessori learning activities

3.5 *Curriculum Design and Implementation of Instructional Programs*
The school provides a comprehensive Montessori educational curriculum based on Montessori's fundamental philosophy of the child and the Montessori planes of development, with clearly-defined learner outcomes. (See "AMS Montessori Program Characteristics Papers" in the *School Accreditation Handbook.*)

3.5.1 Infant and Toddler (Birth — 3)
The Infant & Toddler curriculum is based on 6 integrated developmental areas: sensory and perceptual, cognitive, physical, gross and fine motor, self-help skills, and social/emotional development. The learning environment fosters freedom of movement, integrates daily routines, and provides experiences that develop a child's growth and independence. Indicators of successful implementation include students engaging in daily activities based on their needs, capabilities, and interests.

3.5.2 Early Childhood (2.5 — 6)
The Early Childhood curriculum integrates the core areas of Practical Life, Sensorial, Math, Language, Peace and Cosmic Education, and Cultural Subjects. The learning environment is student-centered and self-directed. It promotes the development of order, coordination, concentration, and independence. Indicators of successful implementation include students engaging in self-directed learning and completing cycles of work independently.

3.5.3 Elementary I (6 — 9) and Elementary II (9 — 12)
The Elementary curriculum integrates the core subjects of Mathematics (including geometry and algebra), Biological and Physical Sciences, Technology, Language Arts and Literature, History, Physical and Political World Geography, Civics, Economics, Anthropology, Peace and Cosmic Education, Art, Music, Additional/World Language, and Physical Education. Individually-paced academic progress allows students to explore their interests and acquire the mastery of basic skills and knowledge. The learning environment is student- centered and designed to promote the development of organizational and time management skills, conflict resolution skills, concentration, independence, cooperation, and collaboration. Indicators of successful implementation include teacher guidance, assessment in planning in concert with student planning, monitoring, and assessing their own work, and demonstrating responsibility for their own learning and actions.

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3.5.4 Secondary I (12 – 14/15) and Secondary II (14/15 – 18)

In addition to the core curriculum areas of Math, Language Arts, Social Studies, Science, Additional/World Language, and Creative Arts, the Secondary curriculum includes opportunities for community service, career exploration, economic awareness, technology, peace and cosmic education, physical education, outdoor education, and field studies. The curriculum prepares students for post-secondary education or careers through self-construction, extensive self-reflection, and opportunities for leadership and personal responsibility. Personality integration and stewardship of the Earth and humanity are crucial elements of the curriculum. Students' independent decision-making, problem solving, community building, and application of learning indicate successful implementation of the curriculum.

3.6 The school publishes and follows a written scope and sequence, across all program levels within the school, which is communicated to all constituencies.

3.7 The school provides uninterrupted work periods of a length appropriate to the age of students served, to support student learning. (See "The Montessori Uninterrupted Work Period" in the *School Accreditation Handbook.)*

- 3.7.1 Infant & Toddler: The school allocates and protects, at minimum, a daily 2-hour work cycle. The time block allows for adult-assisted mealtime, snacks, hygiene, and nap/rest routines.
- 3.7.2 Early Childhood: The school allocates and protects, at minimum, a 2-hour work cycle, 4 days per week. A 3-hour uninterrupted work cycle, 5 days per week is optimal.
- 3.7.3 Elementary: The school allocates and protects, at minimum, a 2-hour work cycle, 4 days per week. A 3-hour uninterrupted work cycle, 5 days per week is optimal.
- 3.7.4 Secondary: The school allocates and protects, at minimum, a 2-hour work cycle for core curricular subjects (math, English, history or humanities, sciences, and additional world language/s).

3.8 The school does not schedule enrichment programs, group snack, whole-group lessons, recess, and transition times during uninterrupted blocks of student work time.

Montessori spirituality

The quality Montessori school…

3.9 Implements a curriculum that encourages the realization of Montessori's vision of a peaceful world.

3.10 Creates and follows policies that speak to the social and emotional health of the students.

3.11 Engages students in environmental stewardship and sustainability activities to foster Montessori's vision of maintaining the planet.

What the Montessori teacher is

The Montessori teacher is…

3.12 One who demonstrates knowledge and internalization of the core beliefs of Montessori philosophy, such as respect for the individual learner; preparation of self and the environment; fostering independence, order and concentration in the

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student; respect for and recognition of sensitive periods, planes of development, intrinsic motivation of the student, and the absorbent mind.

3.13 One who demonstrates fundamental communication skills to support the social and emotional development of students and to communicate with parents about student's social/emotional and academic progress.

What the Montessori teacher does

The Montessori teacher…

3.14 Designs and uses instructional strategies, innovations, and activities that are observation- and research-based, meet student needs, and reflect Montessori best practice.

3.15 Promotes active involvement of students in the learning process.

3.16 Provides for a balance of uninterrupted, self-directed, self-teaching, and collaborative activities with the presentation of individual, small-, and large-group lessons.

3.17 Implements and keeps clear, written records of individual, small-, and large-group lessons and activities and uses a comprehensive record keeping system that accurately reflects each student's development.

3.18 Observes the overall classroom environment during individual lessons and records observations.

3.19 Supports students in assessing their work as developmentally appropriate.

3.20 Uses various methods of communication to discuss student development with parents.

3.21 Implements accommodations and interventions to help students meet expectations for student learning, in consultation with school administrators and parents.

3.22 Recognizes and provides opportunities for students to participate in meaningful, age-appropriate leadership activities.

STANDARD 4: DOCUMENTING AND USING RESULTS – Learner Outcomes

The quality Montessori school enacts an ongoing assessment system that monitors and documents learner outcomes, and uses these results to improve educational effectiveness.

CRITERIA:

In a quality Montessori school, the administrative leader, faculty, and staff collaboratively…

4.1 Determine written benchmarks across all program levels that indicate progress toward the following learner outcomes: academic preparation, autonomy and independence, confidence and competence, global citizenship, intrinsic motivation, social responsibility, and spiritual awareness/cosmic education.

4.2 Create, publish, and implement a data-driven system including qualitative (rubric-based) and quantitative measures (as appropriate to the age level) to assess student progress toward the established learner outcomes.

4.3 Analyze this recorded data, action research, and classroom observations to examine each student's physical, social-emotional, and cognitive development.

4.4 Use the analysis of this data to make curricular and instructional decisions for individual students.

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4.5 Evaluate school-wide effectiveness in meeting established benchmarks using compiled student data.

4.6 Use the results of a systematic analysis of instructional effectiveness to drive continuous improvement of teaching and learning processes.

STANDARD 5: PERSONNEL

The quality Montessori school has policies and practices in place to ensure that employees are well qualified and are assigned professional responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience). Employees are provided support through ongoing evaluation and professional development and are sufficient in number to support the school's mission and vision. The school states and follows fair, ethical, and non-discriminatory employment practices.

CRITERIA:

The quality Montessori school…

5.1 Employs an administrative leader who has professional qualifications that meet state and local regulations, as applicable.
**Emerging criterion effective July 1, 2020: Administrative leader (head of school/principal/executive director) holds a bachelor's degree and qualifies with the minimum number of points required in the Head of School Requirements Verification, or has an approved portfolio variance.*

5.2 Employs lead teachers* who hold a credential for the level they are teaching issued by an AMS, NCME, or AMI teacher education program, or any other MACTE-accredited course (or who are enrolled and in good standing in a qualifying Montessori teacher education program) and qualify with the minimum number of points required in the Teacher Requirements Verification form. In addition, lead teachers must meet all applicable requirements of the state or territory in which they teach.
**Emerging criterion effective July 1, 2020: Instructors of the core subjects of math, English, history or humanities, and sciences, who work with students ages 12 – 18, will be required to have the appropriate, qualifying Montessori credential, i.e., Secondary I or I-II.*

5.3 Employs Elementary and Secondary lead teachers who hold a minimum of a bachelor's degree from a regionally accredited college/university in the U.S., a degree that is deemed to be equivalent, or one that meets the nationally recognized post-secondary educational standard in the state, province, or country of issuance as determined by a recognized U.S. credentialing agency (i.e., a credentialing agency that is a member of National Association of Credential Evaluation Services).
**Emerging criterion effective July 1, 2020: All Infant & Toddler and Early Childhood lead teachers hired after July 1, 2020 must hold a minimum of a Bachelor's degree or equivalent as stated above. All existing employed Infant & Toddler and Early Childhood lead teachers may remain continuously employed at their current school in their current position in perpetuity.*

5.4 Provides written employment agreements for all school personnel annually, including compensation, benefits, and terms of employment.

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5.5 Follows a written school-wide faculty salary scale that recognizes credentialing, education, and years of service.

5.6 Provides written job descriptions for all positions within the school.

5.7 Provides an employee handbook that includes, but is not limited to, the following: AMS code of ethics, an organizational chart, a non-discrimination policy, an anti-harassment statement (including sexual harassment), a discipline policy, description of employee conduct expectations, a grievance procedure, and a policy and procedure for termination.

5.8 Engages in annual staff training on written policies and procedures in employment handbook, including non-discrimination and anti-harassment policies.

5.9 Ensures that all administrative and teaching staff document plans for completion of a minimum of ten (10) hours per year of professional development, which includes a minimum of one (1) hour of continuing professional development per year regarding the education of students with disabilities.

5.10 Ensures that all non-credentialed employees receive an orientation to Montessori philosophy and practice.

5.11 Ensures that the head of school and 100% of credentialed lead teachers maintain active membership in the American Montessori Society.

5.12 Implements an annual evaluation system that sets goals for professional growth for all teaching and administrative personnel.

5.13 Provides dedicated planning time for lead teachers on a weekly basis.

5.14 Maintains ratios of students to adults as appropriate for the age level:

Infants (Birth – 18 months):	4:1
Toddler (15 – 36 months):	8:1
Early Childhood (2.5 – 6 years):	15:1
Elementary (ages 6 – 12 years):	20:1
Secondary I (ages 12 – 14/15 years):	20:1
Secondary II (ages 14 – 18)	25:1

5.15 Assigns at least one Montessori credentialed lead teacher at the age level to meet the following maximum student/adult ratios:

Infants (Birth – 18 months):	10:1
Toddler (15 – 36 months):	16:1
Early Childhood (2.5 – 6 years):	30:1
Elementary (ages 6 – 12 years):	30:1
Secondary I (ages 12 – 14/15 years):	50:1*
Secondary II (ages 14 – 18)	100:1*

**In Secondary programs that utilize a departmental model in which credentialed lead teachers teach multiple sections of a core subject (math, English, history or humanities, sciences, and additional world languages), each lead teacher shall have a total student caseload no higher than stated above.*

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STANDARD 6: FACILITY RESOURCES

The quality Montessori school provides facilities, sites, and equipment that meet optimum health and safety standards conducive to a safe learning environment in alignment with the mission of the school.

CRITERIA:
The quality Montessori school:

6.1 Certifies that the facilities meet all applicable federal, state, and local laws, standards, and regulations including, but not limited to, building codes and safety standards as required by local and civil authorities and the Americans with Disabilities Act.

6.2 Provides and maintains a site, facilities, services, equipment, and furnishings to ensure a safe environment for all occupants. Evidence of mandated safety protocols are provided in the form of completed health, fire, playground and/or other inspections.

6.3 Provides and maintains a site, facilities, services, equipment, and furnishings that support the school's instructional and co-curricular programs, which includes consideration of light, ventilation, and temperature.

6.4 Has written policies for the access to and use of the school site and facilities by individuals or groups outside of school hours with provision for adequate legal protections.

6.5 Has facilities that are adequate for developmentally-appropriate gross motor activity including space for safe, vigorous physical activity.

6.6 Has accessible, neat storage for teacher materials.

STANDARD 7: FINANCES & STABILITY

The quality Montessori school maintains strong and prudent financial management practices and adequate fiscal resources to support its mission and vision.

CRITERIA:
The quality Montessori school…

7.1 Complies with all federal, state, and local regulations, as required by the school's legal status, and is verified by the AMS Independent Accounting Questionnaire.
**It is the school's responsibility to be aware of all these laws and regulations and to take steps to be and remain in compliance. It is not the responsibility of AMS or the Visiting Team to independently verify compliance. Accreditation by AMS is not certification of a school's compliance with applicable laws and regulations.*

7.2 Monitors all financial practices and transactions by engaging an external accounting firm or certified individual annually to review and report on the school's financial practices and financial status through one of these recognized accounting services: review, compilation, or audit.

7.3 Develops an annual operating budget that is approved by the governing body or owner.

7.4 Utilizes a system for accurately tracking and documenting revenue and expenses.

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7.5 Reports on current year financial performance through the preparation of financial statements on a monthly or quarterly basis to the governing body or owner for oversight.
7.6 Clearly states and publishes financial responsibilities of parents (if applicable).
7.7 Maintains a written policy for managing, disbursing, and overseeing the allocation of funds awarded through its financial assistance program (if applicable).
7.8 Engages in financial planning for the long-term sustainability of the school.

STANDARD 8: RECORDS, RESOURCES, AND SUPPORT SYSTEMS

The quality Montessori school has appropriate documentation, training, and human resources to meet applicable federal, state, and local regulations, assure health and safety of faculty/staff and students, and enable all students to achieve expectations for student learning.

CRITERIA:
The quality Montessori school...

8.1 Develops and implements a published comprehensive health (physical and emotional) and safety plan, preventive/emergency preparedness plan, and crisis management plan.
8.2 Annually reviews, updates as needed, and shares with appropriate stakeholders the comprehensive health and safety plan, preventive/emergency preparedness plan, and crisis management plan. (Plans should reflect the date of the most recent review and/or revision.)
8.3 Ensures that staff are trained, as required by local and state authorities, to comply with all current local and state safety regulations, including provisions made to simulate events and practice the execution of health and safety policies and procedures.
8.4 Maintains records of scheduled, completed emergency drills.
8.5 Documents and reports student incident/accidents that occur during school hours.
8.6 Maintains insurance coverage: fire and extended coverage, comprehensive liability, workers' compensation, and director and officers' liability Insurance (if applicable).
8.7 Creates and publishes policies and procedures for field trips and off-site events that provide for the safety of the students including proper chaperoning and procedures for use of commercial and/or private vehicle transportation.
8.8 Maintains and distributes to staff students' emergency, health, and academic records at the site of attendance:
8.8.1 Ensures that all teachers, administrators, and appropriate staff members shall receive any and all necessary information about a student's disability-related needs, which may include a copy of a student's specialized education program, to ensure that disability-based accommodations and specialized instruction occur consistently throughout the student's day.

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8.8.2 Provides a plan regarding retention of student records upon closing of the school that abides by state or local regulations.

8.9 Maintains on file and provides to families of students with disabilities, as necessary or requested, a list of professional support services and agencies in the community that are able to assist students with disabilities and families of students with disabilities.

8.10 Assists families in establishing connections with agencies, programs, and/or community resources that may be beneficial to the students with disabilities and/or their families.

8.11 Maintains employee records including Montessori credentials, licenses, teaching certificates, transcripts, evaluations, and background checks.

8.12 Has a policy for maintaining and backing up student, former student, and employee records and business files in accordance with all applicable federal, state, and local laws.

8.13 Ensures accessibility to all legal documents as required by federal state and local laws/regulations befitting the school's legal status.

STANDARD 9: STAKEHOLDER COMMUNICATION AND RELATIONSHIPS

The quality Montessori school fosters effective communications and relationships with and among its stakeholders.

CRITERIA:

The quality Montessori school...

9.1 Has formal channels described and outlined in a policy and procedures document to listen to and communicate with stakeholders.

9.2 Publishes a parent handbook that articulates policies and procedures relevant for students and families, including an anti-bullying statement, a student discipline policy, and a grievance procedure.

9.3 Solicits the knowledge and skills of stakeholders to enhance the work of the school.

9.4 Communicates, through multiple channels, the expectations for student learning, learner outcomes, school effectiveness, and goals for improvement to all stakeholders.

9.5 Provides the necessary tools that enable outreach and engagement to the school's families, including those whose first language is one other than the primary language spoken in the school.

9.6 Conducts annual assessments of school effectiveness with constituents, and analyzes and shares results.

9.7 Develops a written observation policy and encourages visits by parents and other community members.

9.8 Practices community engagement by providing information about school programs, and seeks ways to contribute locally.

9.9 Provides family support and enrichment opportunities such as workshops on Montessori philosophy and curriculum, parenting issues, child development, and health and safety issues.

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Appendix #2

Self-Study Report Review Checklist

Use this checklist to determine that all required components of your self-study are included.

COMMITTEE ROSTER:

☐ The report includes a Roster of the Steering Committee and, if applicable, Sub-Committee, including names and roles in the school.

SELF-STUDY PROCESS:

☐ The report includes an Introduction section that describes the school's self-study process, including:

- Any discoveries, revelations, and/or lessons learned by each constituent
- What each constituent found to be most beneficial
- The effect of the process on the constituents and the school as a whole
- How the school will use what it has learned during the process

SCHOOL UPDATES NOTIFICATION:

☐ The School Update Form indicates changes in faculty and/or classroom information since the date of application.

There have been changes in:

- ☐ Faculty Credentials (State and/or Montessori)
- ☐ Faculty Class Assignment(s)
- ☐ Age range of students in a class
- ☐ Number of students enrolled in a class
- ☐ Addition or elimination of a class(s) and/or level(s)
- ☐ New hires of lead teacher(s)

PROFILE OF THE SCHOOL:

The Profile of the School includes:

The Legal Personality

- ☐ The history of the school
- ☐ Identifies the legal personality of the school and relates all pertinent information
- ☐ Information of the governing body and structure
- ☐ An organizational chart
- ☐ A description of a system or plan for short- and long-term sustainability of the governing body
- ☐ A description, if applicable, of the procedure used to review the Board of Trustees by-laws, nomination process, member's length of term, etc.
- ☐ A description of the procedure used to review policies and procedures

The Students, Families, Staff, Faculty, and Community

- ☐ Information on the student body and families
- ☐ Demographics of enrolled students and families
- ☐ Demographics of surrounding community or applicant families
- ☐ Information on enrollment; includes enrollment of past 3 years and projects enrollment for upcoming 3 years
- ☐ Parent education

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- ☐ Teacher Montessori credentials and degrees earned
- ☐ Professional development for staff

Facilities and Finances

- ☐ Description of facilities
- ☐ Floor plan
- ☐ Overview of the school's finances

Summary

- ☐ Areas of strength
- ☐ Areas that need improvement

STANDARD 1:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 1.
- ☐ Areas of strength related to Standard 1.
- ☐ Areas for improvement related to Standard 1.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 1.

STANDARD 2:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 2.
- ☐ Areas of strength related to Standard 2.
- ☐ Areas for improvement related to Standard 2.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 2.
- ☐ The report includes the process used to develop the Strategic Plan and how goals developed in the Standards Assessment are incorporated into the Strategic Plan document.
- ☐ The report includes the school's strategic plan that includes for each strategic goal:

  The strategic goal

  - ☐ The objective
  - ☐ The action/strategy
  - ☐ The resources and identification of:
    - ☐ The timeline
    - ☐ Personnel
    - ☐ Funds
    - ☐ Source of funds
  - ☐ Method of monitoring progress
  - ☐ Criteria for evaluating the attainment of the goal

STANDARD 3:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.

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- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes an explanation of the educational nature of the school with examples for each level including:
  - ☐ Description and examples of the school's *Montessori Learning Environment* for each age level
  - ☐ Description and examples of the school's *Students' Learning Activity in a Montessori Environment* for each age level
  - ☐ Description and examples of the school's *Montessori Learning Relationships* for each age level
  - ☐ Description and examples of the school's *Montessori Spirituality* for each age level
  - ☐ Description and examples of what the school's *Montessori Teacher Is* for each age level
  - ☐ Description and examples of what school's *Montessori Teacher Does* for each age level
- ☐ The report includes a thorough explanation of how the school meets Standard 3.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 3.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard3.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 3.

STANDARD 4:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes evidence of the Learner Outcomes including examples of the following with examples for each level:
  - ☐ *Independence*
  - ☐ *Confidence and Competence*
  - ☐ *Autonomy*
  - ☐ *Intrinsic Motivation*
  - ☐ *Social Responsibility*
  - ☐ *Academic Preparation*
  - ☐ *Spiritual Awareness*
  - ☐ *Global Citizenship*
- ☐ The report describes how the school collects data and evaluates progress towards outcomes
- ☐ The report includes a thorough explanation of how the school meets Standard 4.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 4.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 4.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 4.

STANDARD 5:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 5.

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- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 5.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 5.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 5.

STANDARD 6:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 6.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 6.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 6.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 6.

STANDARD 7:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 7.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 7.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 7.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 7.

STANDARD 8:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 8.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 8.
- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 8.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 8.

STANDARD 9:

- ☐ The report includes a list of verification documents that will be available for review by the onsite visiting team.
- ☐ The report includes a list of any applicable state and/or licensing regulation(s) that the school must comply with for each criteria, or an indication that there are no applicable regulations.
- ☐ The report includes a thorough explanation of how the school meets Standard 9.
- ☐ The report includes a thorough explanation of the school's areas of strength related to Standard 9.

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- ☐ The report includes a thorough explanation of the school's areas for improvement related to Standard 9.
- ☐ The report includes a thorough explanation of the school's goals that relate to Standard 9.

OTHER REPORT REQUIREMENTS:

- ☐ The report was comprehensive and provided a clear picture of the school.
- ☐ The report was well-organized and user-friendly.
- ☐ The report clearly indicates that the self-study was a collaborative process.

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AMS PATHWAY HANDBOOK

Appendix #3

Guidelines for Collecting Stakeholder Feedback

The AMS school accreditation process is designed as a vehicle for each school to reflect upon the effectiveness of all aspects of its operations. As part of the self-study, the entirety of the school's staff and members of the larger school community (including board members, parents, and students) are involved in an inclusive, collaborative, and reflective process in which the community assesses the congruence between the school's mission and day-to-day experience, identifies areas of strength and areas for improvement, and creates a roadmap for school improvement in the years to come.

As part of this process, the school is expected to engage all constituents in its self-study. One of the ways in which the school should engage its full community in the process is by conducting surveys of its students, parents, and faculty/staff. The purpose of the stakeholder feedback surveys is to gather data about stakeholder perceptions of the school. Below you will find guidelines for conducting stakeholder surveys.

Creating your stakeholder survey:

- What distribution method will be used?
  - Surveys can be administered online and/or using paper
  - Research Electronic survey tools that can help you administer surveys and analyze the results such as Survey Monkey and (many of these tools have a free version that might work for your needs)
- Determine how many surveys you will need to create.
  - Which stakeholder groups will you survey?
  - Develop a separate survey for each stakeholder group including one for parents, faculty/staff, board members, or even alumni families.
- Determine the data you want to collect and what questions to ask.
- Establish your survey methodology.
  - Which types of questions will yield the data you're looking for?
  - Consider pros and cons of open-ended, multi-choice, ordinal scale (rank the importance of the following…), and interval scale (on a scale of 1 to 10…) questions.
- Set an anticipated or target response rate.
  - Suggested target response rates—parent questionnaire: equal to or greater than 20%; student questionnaire: equal to or greater than 40%; faculty/staff questionnaire: equal to or greater than 60%
  - Consider strategies to encourage participation in the survey.
- Set your timeline:
  - When should the survey be distributed?
  - How often should a reminder be sent?
  - When should the survey be closed?

Preparing stakeholders and building awareness:

- Consider sending a communication to stakeholders a week or two prior to survey administration to:
  - Build awareness of survey
  - Reassure stakeholders of the purpose and importance of collecting stakeholder perception data

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    - Encourage participation
- Discuss the importance of collecting and using stakeholder perception data during a staff meeting.
- Consider sharing one or more of the surveys and have a guided conversation about how staff feels about providing/collecting this type of perception data and how it will be used as part of a continuous improvement process. Encourage a culture of trust and honesty.

Analyzing your survey results:
Below are some suggested areas for inclusion when you analyze your survey results in your self-study report.

1. Questionnaire Design & Administration
Provide a brief description of how the school designed and administered the survey. This should include the following information:

- Describe how you designed the survey.
- Describe how you administered the survey and encouraged participation.
- If you surveyed only a sample population, describe how the sample was identified.
- Describe any accommodations you provided to participants (i.e., paper surveys for those without internet access, surveys in alternate languages, etc.).
- Describe how you ensured that participation was reflective of the overall stakeholder population.

2. Stakeholder Feedback Results and Analysis
Provide stakeholder feedback results using tables, graphs, or other visual depictions that provide data for each survey administered by your school. When selecting data to include in this section, consider the following:

- Results from all surveys administered including parent, staff, and student surveys.
- Comparative data from multiple administrations of the survey to provide comparison and trend data for each survey.
- Survey results may be disaggregated by appropriate subgroups for your institution (i.e., ethnicity, gender, grade level). Identify existing subgroups that are appropriate based on your community.
- Include other stakeholder feedback results that you may have collected from focus groups, forums, or other surveys.

Also consider the following questions in your survey analysis:

- Areas of strength:
    - Which area(s) indicate the overall highest level of satisfaction or approval?
    - Which area(s) show a trend toward increasing stakeholder satisfaction or approval?
    - Which of the above reported findings are consistent with findings from other stakeholder feedback sources?
- Areas for improvement:
    - Which area(s) indicate the overall lowest level of satisfaction or approval?
    - Which area(s) show a trend toward decreasing stakeholder satisfaction or approval?
    - What are the implications for these stakeholder perceptions?
    - Which of the above reported findings are consistent with findings from other stakeholder feedback sources?

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Appendix #4

The Montessori Uninterrupted Work Period Requirements/Guidelines Defined

The American Montessori Society School Accreditation Commission and the AMS Teacher Education Action Commission offer this resource to AMS schools and affiliated teacher education programs to clarify AMS's definition of optimal uninterrupted work period in Montessori classrooms. AMS-accredited schools are required to meet the following definitions of uninterrupted work time for each applicable program level (as articulated in Criterion 3.9 of the AMS School Accreditation Standards and Criteria), and these definitions are recommended as best practice for AMS member schools. This explanation is comprehensive but not exclusive of what may be observed in AMS-accredited schools during the work cycle.

Overview

The uninterrupted work period is fundamental to the Montessori approach, which recognizes and respects individual variations in the learning process. Within the Montessori environment, the children need to have time to work through various tasks and responsibilities at their own pace. This uninterrupted work period is vitally important, as that is when the building of coordination, concentration, independence and order, and the assimilation of information are able to occur.

At all levels, students with special needs may need unique considerations, such as:

- variation in work time block
- more one-on-one teacher time and direction
- being removed from the class for therapeutic services

While the work will look different for each age group, at all program levels children should have ample time allotted for the uninterrupted work period. The following is intended to be a guide to what an observer would see during the uninterrupted work cycle:

Infant & Toddler

Responsive schedules and routines help provide infants and toddlers with a sense of security and self-awareness through predictability. Classroom schedules recognize that daily routines *are* curriculum for the infant and toddler. Large uninterrupted blocks of time support infants and toddlers to express independence, engage in spontaneous activity, self-regulate through periods of high- and low-activity. **In AMS-accredited schools, Infant and Toddler programs allocate and protect at minimum a 2-hour work cycle daily. This time block allows for adult-assisted mealtime, snacks, hygiene, and nap/rest routines.**

At the **Infant level**, each child typically has his/her own schedule, which should be posted for parents and teachers. There might be a period of time during which some meals are "scheduled" such as breakfast between 8:00 and 9:00 for older infants who can sit at a table and eat solid foods, but, in general, the guiding principle is "follow the child," based on each child's schedule and observed needs. Infants should be free to move throughout the day, and should not be placed in any kind of apparatus that restricts movement, or in any place/position they cannot get out of on their own (The exception to this is the very young, non-mobile infant, who may spend time lying on his/her back and/or his/her stomach throughout the day. The teacher would place the child in this position and

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would move him/her based on cues they receive from the infant). Overall, you should observe children freely moving and exploring the environment, with adults observing and assisting individual children only as needed.

During an infant's day, you should not see a heavy emphasis on group activities and multiple group transitions. At the Infant level, you should observe children freely moving and exploring the environment, with adults observing, and assisting individual children only as needed. During an Infant work cycle, you should see a heavy emphasis on individual activities and transitions.

At the **Toddler level**, children explore materials in the classroom environment independently and may work at the shelf or take a work to a table or floor rug. Teachers are observing or quietly moving through the room, assisting or redirecting as needed. Teachers may also be modeling/encouraging toddlers to "restore their work" as they go and facilitating problem solving between students. At this level, the source of interruption to the work cycle is adult-driven rather than schedule-driven. Interruptions occur when a teacher chooses to model a material for a child who is having difficulty, engages a child who is reluctant, or redirects a child towards another material if it is being used inappropriately.

Observations made during the morning cycle should include children freely moving, choosing work, exploring materials in all areas of the room, moving inside and outside, helping to prepare or getting snack, and using the toilet/having diaper changed.

Snack practices and routines can vary, ranging from a scheduled group snack, to snack available for children to choose from throughout the morning (similar to Early Childhood), to children helping to prepare and/or serving themselves their own snack, which is best practice. There is typically a large group time, lasting about 15 minutes, sometime in the morning, during which the teacher might read a book, sing songs, and/or do finger plays; participation is optional and based on toddler choice.

Practical life/care-of-self activities such as serving snack, eating snack, and washing dishes after snack, as well as using the toilet (learning how to push down pants, how to sit on toilet, how to wash hands when done, etc.) are an important part of the day. If outdoor play time is scheduled, it should be at the beginning of the work cycle or at the end.

Early Childhood

At the **Early Childhood level**, a 3-hour uninterrupted work cycle, 5 days per week, is optimal, and a 2- to 3-hour work cycle, 4 days per week, is the required minimum for AMS-accredited schools. Schools provide large blocks of unscheduled time to ensure that individual children have the time to settle into a task that interests them and are not unnecessarily interrupted when they are engaged in a worthwhile activity.

During the work period, teachers observe the behaviors of the children and invite individuals and small groups to short lessons when they see opportunities to assist a child's progress. Optimally, the majority of each morning and afternoon is devoted to self-motivated work. This time may include individual- or self-chosen small group activities and short lessons by the teacher for children who have accepted an invitation to the lesson.

The uninterrupted work period does not include whole-class lessons or other activities such as adult-led group circle meetings for which participation of all children is required. Outdoor play time,

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specials, and enrichment classes for the whole group should not interrupt and are not included in the work period.

Elementary

At the **Elementary level**, a 3-hour uninterrupted work cycle, 5 days per week, is optimal, and a 2- to 3-hour work cycle, 4 days per week, is the required minimum for AMS-accredited schools. During the uninterrupted work cycle, one should see students engaged in developmentally appropriate work. The work should include Montessori hands-on materials that are appropriate for the individual needs of each student. The teacher will be working with students individually and in small groups, in hands-on engaging Montessori lessons. Students will be collaborating as they work on a task or research project together. Students are also managing work expectations. A contract, work plan, or work journal may be used to help with organization and time management skills.

At the Elementary level, full-class lessons should not take place during the uninterrupted work cycle. Rather, they should be presented before or after the uninterrupted work cycle. Outdoor play time, specials, and enrichment classes for the whole group should not interrupt and are not included in the work period. Circle time should also be held before or after the uninterrupted work cycle.

Secondary

At the **Secondary level**, the length of the work cycle varies by setting. Small programs with a single Secondary-credentialed guide will look different than large programs, particularly at the Secondary II level when course requirements and credits needed for diplomas are considered. The critical aspect is encouraging flexibility within extended blocks of time. In AMS-accredited schools, Secondary programs allocate and protect at minimum a 2-hour work cycle for core curricular subjects (math, English, history or humanities, sciences, and additional world language(s). It is important that this large block of time is not divided into daily, one-hour class periods.

Student work periods may vary in length each day. An observer might see the following lessons presented during the uninterrupted work period: mini-lessons, impressionistic lessons, procedural lessons, small-group lessons using flexible grouping based on needs, and individual lessons. Students are taught to use a checklist and to plan their worktime to be able to meet deadlines. This includes independent work, small-group work, self-checking work with controls or other methods, and project work by individuals or groups. The teacher/guide is working with/among students. Many teachers have a space in their classrooms for students to request lessons on topics they identify.

Brief, student-focused large-group activities (including mini-lessons, group initiatives/community building, solo/reflection time, seminar/discourse, etc.) may occur during the work cycle. These activities include the active engagement of the teachers. Whole-group activities are scheduled at natural transition times (e.g., beginning of the block, before or after lunchtime, at the end of the block/day) so that the work cycle can be preserved.

At the Secondary level, during the work cycle, there should be no lectures or presentations that last longer than 20 minutes. Individuals should not be removed from the class for services or programs. There should not be a lot of unnecessary socializing, group meals or snacks, or school-wide assemblies during this time.

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AMS PATHWAY HANDBOOK

Appendix #5

Materials Lists

The American Montessori Society School Accreditation Commission and the AMS Teacher Education Action Commission offer you this list of suggested learning materials for the Infant & Toddler classroom. The intent of this checklist is to provide Montessori schools and teacher education programs with a list of developmentally-appropriate materials and activities that very young children ages birth to 3 years are generally expected to have available in their classrooms. This list is comprehensive but not exclusive or prescriptive and teachers may also present other activities. Not all of these activities are expected to be out at any given time, but a wide variety of them should be provided at some point throughout the year. It is particularly important to consider cleanliness and safety with this age group, including awareness of potential choking hazards.

Infants - Birth to 18 Months	
Practical Life, Arts and Crafts	
	Bathing
	Changing Diaper, Changing Pants, Dressing and Undressing
	Floor Mattresses or Futons for Sleeping
	Use of Handkerchief/Tissue
	Use of Toilet
	Washing Hands
	Washing Face
	Replacing Materials on the Shelf
	Drying Spilled Water
	Feeding the Baby (should have adult glider or rocking chair for this purpose)
	Picking up Sand, Mulch, Rocks
	Self-Feeding: Eating with Hands, Grasping, and then Introducing Use of Cup and Spoon
	Setting the Table
	Serving Oneself
	Watering Plants
	Greeting and Saying Goodbye
	Gentle Touch with Others
	Respecting Others Work and Space
	NOTE: Many of the Care of Self and Care of Environment items listed in this section are to be introduced and modeled by the adult. These behaviors are not expected to be done consistently or independently by the child.

Infants - Birth to 18 Months	
Movement	
	Blocks
	Balls of Many Textures and Sizes

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Infants - Birth to 18 Months	
Movement	
	Bar for Pulling Oneself up
	Differing Levels of Floor Space
	Differing Sizes/Styles of Chairs for the Child Starting with a Weaning Chair for Newly Seated Children and Moving to Chairs with No Arms for Older Infants
	Low Tables
	Incline Plane
	Maximum Effort Activity
	Pull and Push Toys
	Mirrors (long, horizontal)
	Slide
	Stair with Rails
	Outdoor Walks
	Wheelbarrow
	Box with Ball
	Nesting Objects
	Objects in a Basket for Exploration (Treasure Basket)
	Peg Block (Single-knobbed cylinder block)
	Rhymes and Singing with Actions
	Ribbon and Bell
	Dance: Free Movement with Rhythm

Infants - Birth to 18 Months	
Sensorimotor	
	Black and White Contrast Mobile
	Variety of Visual Mobiles (different colors, different shapes)
	Variety of Grasping (or Kicking) Mobiles (different colors, shapes, textures, and sounds)
	Shape Sorting Materials (simple, no more than three shapes)
	Rattles
	Bell
	Drum
	Music Box
	Sound System and Recordings

Infants - Birth to 18 Months	
Language	
	1-2 Piece Puzzles
	Books
	Bead Maze (Roller Coaster)

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Infants - Birth to 18 Months	
Language	
	Ball Tracker
	Reciprocal Vocalization
	Verbalization and Conversations (with the child)
	Naming Objects in the Environment
	Pictures of Authentic Activities for Conversation (placed low so Infants can see them)
	Rhymes and Songs with Actions
	Sign Language
	Vocabulary Picture Cards

Toddlers - 18 to 36 Months	
Practical Life, Arts and Crafts	
	Brushing Teeth
	Combing Hair
	Simple Dressing Frames (zipper, button, snap, buckle)
	Dressing and Undressing
	Bathing the Doll
	Object Washing (e.g., shell)
	Folding and Putting Clothes Away
	Taking off and Putting on a Coat
	Taking off and Putting on Shoes
	Using a Handkerchief/Tissue
	Using the Toilet
	Washing Hands
	Dusting
	Replacing materials on the shelf
	Rolling a small rug
	Feeding Pets
	Flower Arranging
	Folding
	Raking
	Shoveling
	Sowing Seeds
	Sweeping, Mopping, and Using a Dustpan
	Clothes Pins
	Washing Plant Leaves
	Washing a Table
	Watering Plants

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Toddlers - 18 to 36 Months	
Practical Life, Arts and Crafts	
	Pouring Water
	Spreading
	Cutting Fruits/Cheeses
	Making Juice
	Setting the Table
	Serving Food (with hands, scoops, spoons, tongs, etc.)
	Baster or Eyedropper
	Clearing the Table
	Washing Dishes

Toddlers - 18 to 36 Months	
Movement	
	Outdoor Walks
	Walking in a circle
	Walking a Straight Line on the floor
	Balance Beam
	Bar from which to Hang
	Swing – outdoor
	Sandbox
	Objects to Climb Over
	Tunnel to Climb Through
	Rocking Horse/Boat/Chair
	Vestibular Board (e.g., sit and spin)
	Riding Toys (e.g., tricycles)
	Carrying and Pushing Heavy Objects
	Nesting Objects
	Vertical Ring Post
	Horizontal Ring Post
	Large Bead Stringing
	Opening and Closing Containers
	Nuts and Bolts
	Hammering
	Spooning
	Dry Pouring
	Liquid Pouring
	Pouring with a Funnel
	Transferring Water with Eyedropper
	Toddler Drawer (Small set of drawers to open and close)

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Toddlers - 18 to 36 Months	
Movement	
	Tonging

Toddlers - 18 to 36 Months	
Sensorimotor	
	Stacking/Nesting Boxes
	Posting Boxes (Imbucare Boxes)
	Simple Cylinder Block
	Geometric Shape Box/Imbucare Box with Geometric Shapes/Shape Sorter
	Puzzles (including a geometric shape puzzle)
	Sorting
	Color Matching
	Music
	Sounds in the Environment
	Voice: Tone and Volume
	Simple Sound Matching (4 Pairs)
	Percussive Instruments (e.g., maracas, small floor drums, bells, rain sticks)
	Music Box
	Mystery Bag
	Geometric Solids (natural wood; beginning solids only)
	Texture and Temperature in the Environment
	Rough and Smooth Textures
	Smelling and Tasting Experiences (e.g., food, flowers, grinding spices)
	Outdoor Experiences in Nature: Rain, Dirt, Leaves to promote awareness of smells
	Paper Tearing
	Paper Cutting with small rounded tip scissors
	Pasting
	Sewing Cards
	Peg Boards
	Bead Stringing
	Play Dough
	Chalkboard
	Painting
	Crayons
	Hammering
	Tracing Letters/Numbers

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Toddlers - 18 to 36 Months	
Language	
	Singing/Finger Plays
	Dialogues
	Reciprocal Vocalization
	Naming objects in the Environment
	Mystery Bag
	Classified Objects
	Vocabulary Cards
	Matching Objects with Cards
	Books (Objects, Actions, Stories)
	Farm
	Non-Working Telephone
	Object to Object Match
	Object to Picture Match
	Picture to Picture Match
	Matching: Pictures of Objects that Go Together (i.e., spider and spider web)
	Objects for "I Spy" with initial sounds

In addition to the Montessori materials, a quality Montessori school has the following...

In addition to Montessori materials, it is important to recognize that the qualities, skills, and behaviors of the adults responsible for meeting the needs of these young children are incredibly important during this most important stage of self-construction. This is the crucial time in which children are absorbing experiences, making early decisions about the kind of persons they are, and about the world. They are developing basic trust in themselves and in their environment which will affect them for the rest of their lives.

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The American Montessori Society School Accreditation Commission and the AMS Teacher Education Action Commission offer you this list of suggested learning materials for the Early Childhood classroom. The intent of this checklist is to provide Montessori schools and teacher education programs with a list of traditional, developmentally-appropriate materials and activities that students ages 2½ through 6 years are generally expected to have available in their classrooms. This list is comprehensive but not exclusive or prescriptive and teachers may also present other activities.

Suggested Materials List: Early Childhood

Early Childhood	
Practical Life, Arts and Crafts	
	Grace and Courtesy (greetings, please, thank you, sorry, interrupting, etc.)
	Walking on a Line
	Rolling and unrolling a rug
	Moving Furniture
	Sequence of Pouring activities (including solids and liquids)
	Sequence of Scooping/Spooning activities
	Sequence of Squeezing activities (e.g., sponge/baster/clothespins/tongs/tweezers)
	Sequence of Threading activities
	Sequence of Twisting activities (bottles & caps, nuts & bolts, etc.)
	Sequence of Folding activities
	Sweeping activities (broom, dustpan & brush, table brush & pan)
	Mopping the floor (mop and bucket)
	Scrubbing a table/chair
	Washing a window (or mirror)
	Sequence of Polishing activities (mirror/wood/metal)
	Watering a plant
	Flower arranging
	Feeding an animal
	Dressing Frame - Buttons
	Dressing Frame - Zipper
	Dressing Frame - Buckles
	Dressing Frame - Lacing
	Dressing Frame - Bow-tying
	Nose-blowing
	Handwashing
	Clothes/Towel Washing
	Ironing
	Sequence of Food Preparation and Serving activities

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Early Childhood	
Practical Life, Arts and Crafts	
	Dishwashing
	Outdoor Gardening activities (e.g., raking, weeding, planting, watering, harvesting)
	Play Dough (or Clay)
	Crayons
	Sequence of Pasting/Glue activities
	Sequence of Scissor Cutting activities
	Sequence of Brush Painting activities
	Sequence of Sewing/Weaving activities

Early Childhood	
Sensorial	
	Cylinder Blocks (Knobbed Cylinders) – 4 blocks
	Pink Tower (Tower of Cubes)
	Brown Stair (Broad Stair)
	Red Rods (Long Rods)
	Knobless Cylinders – 4 boxes
	Color Tablets – Box I
	Color Tablets – Box II
	Color Tablets – Box III
	Geometric Cabinet w/ Demonstration Tray and 3 sets of cards
	Constructive Triangles – 5 Boxes: Triangle, Large Hexagon, Small Hexagon, Rectangle, Blue Geometric Solids and Bases
	Binomial Cube
	Trinomial Cube
	Sound Boxes (Sounds Cylinder)
	Bell Material w/ mallet and damper
	Rough and Smooth Boards – 2 or 3 boards
	Rough Gradation Tablets (Touch Tablets)
	Fabric matching (Touch Fabrics)
	Mystery Bag (Stereognostic)
	Baric Tablets
	Thermic Bottles
	Smelling Bottles
	Tasting exercise
	Sequence of Sorting activities (by size, color, shape, etc.)
	Silence Game

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Early Childhood	
Math	
	Red and Blue Rods (Number Rods and Numerals)
	Sandpaper Numerals
	Spindle Boxes
	Numerals and Counters (Cards and Counters/Odds and Evens)
	Memory Game
	Golden Beads - Intro to Decimal Quantity (One Tray)
	Golden Beads - Large and Small Numeral cards
	Golden Beads - Intro to Decimal System (Nine Tray/Function of the Decimal System)
	Golden Beads - Four Operations (Addition, Multiplication, Subtraction, Division)
	Stamp Game
	Teen Boards (Séguin Boards) and Beads
	Tens Boards (Séguin Boards) and Beads
	Hundred Board
	Short Bead Stair
	Short Bead Chains (Square chains) w/ squares and arrows
	Long Bead Chains (Cube chains) w/ cubes and arrows
	Addition Snake Game
	Addition w/ Bead Bars
	Multiplication w/ Bead Bars
	Addition Strip Board and Tables
	Subtraction Strip Board and Tables
	Multiplication Board and Tables
	Unit Division Board and Tables
	Addition Working Charts (Finger Charts, etc.)
	Subtraction Working Charts (Finger Charts, etc.)
	Multiplication Working Charts (Finger Charts, etc.)
	Division Working Charts (Finger Charts, etc.)
	Multiplication w/ Bead Bars

Early Childhood	
Language	
	Oral language development activities (Sharing news, fingerplays, songs, stories, etc.)
	Child library area w/ fiction and non-fiction picture books
	Picture/Object matching
	Picture/Picture matching
	Classified Three-Part cards (Pictures, labels, control cards)
	Classified Picture Cards for vocabulary and sorting by category
	Phonemic awareness activities w/ objects or pictures (e.g., I-Spy)

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Early Childhood	
Language	
	Metal Insets w/ pencils, pencil holders, trays, paper
	Sandpaper Letters
	Sand Tray
	Large Movable Alphabet - composition of words and phrases
	Small chalkboards or whiteboards for writing
	Writing Sequence
	Comprehensive writing program
	Object Box I: Intro to reading phonetic words
	Picture/word matching - phonetic
	Object Box II: Intro to reading words w/ phonograms
	Double Sandpaper Letters
	Picture/word matching - w/phonograms
	Silent “e”
	Puzzle Words (for English)
	Environmental Labels
	Action Commands
	Series of Phonics-based Readers

Early Childhood	
Cultural (Geography, History, Natural, and Physical Sciences)	
	Land and Water Forms
	Land and Water Forms Three-Part Cards and Definitions
	Globe of Land and Water (Sandpaper Globe)
	Globe of the Continents (Continents Globe)
	Puzzle Map - World Parts (Hemispheres)
	Puzzle Map - North America
	Puzzle Map - South America
	Puzzle Map - Europe
	Puzzle Map - Asia
	Puzzle Map - Africa
	Puzzle Map - Australia
	Puzzle Map - A country e.g., USA, Mexico, Canada, Japan, China
	Tool and felt pad for pin-pricking maps
	Packets of Pictures for Continents/Countries
	Flags
	Calendar
	Clock
	Classification: Living/Non-Living picture cards

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Early Childhood	
Cultural (Geography, History, Natural, and Physical Sciences)	
	Classified Picture Cards - Animals
	Classified Picture Cards - Plants
	Classification: Animal/Plant picture cards
	Parts of a Horse (mammal)
	Parts of a Bird
	Parts of a Turtle (reptile)
	Parts of a Frog (amphibian)
	Parts of a Fish
	Botany Cabinet (leaf shapes) and cards
	Parts of a Plant (tree)
	Parts of a Flower
	Parts of a Leaf
	Sink/Float activity
	Magnetic/Non-magnetic activity
	Solid to Liquid to Gas activity
	Peace Education materials

In addition to the Montessori materials, a quality Montessori school has the following…

Early Childhood	
Practical Life, Arts and Crafts	
	Large motor i.e., woodworking

Early Childhood	
Sensorial	
	Sorting activities by size and color
	Photographs/Illustrations of building using the following materials
	Cylinder Blocks (Knobbed Cylinders) – 4 blocks
	Pink Tower (Tower of Cubes)
	Brown Stair (Broad Stair)
	Red Rods (Long Rods)
	Knobless Cylinders – 4 boxes
	Color Tablets – Box II
	Color Mixing
	Picture Cards or Matching Geometric solids in real life
	Geo Boards
	Pattern Blocks

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Early Childhood	
Math	
	Numeral Cards
	Dot Game
	Equation Cards (static and dynamic)
	Fractions
	Fraction Circles (Insets)
	Fraction Skittles
	Money - Coin recognition
	Money - Activities

Early Childhood	
Language	
	Object Boxes (match initial sounds)
	Objects to be spelled using the Movable Alphabet
	Pictures to be spelled using the Moveable Alphabet
	Composing Words
	Vocabulary Activities
	Non-phonetic reading books
	Easy Readers
	Poetry
	Mini environments e.g., farm/phonetic
	Mini environments e.g., farm/non-phonetic
	Farm or equivalent for intro to grammar
	Grammar Symbols
	Nouns
	Verbs
	Article
	Adjectives

Early Childhood	
Cultural (Geography, History, Natural and Physical Sciences)	
	Directions – North, South, East, West
	Cultural Artifacts
	Cultural Explorations of the World (e.g., Continents, Countries, Clothing, *Food, Landmarks, Traditions)
	Observation of Seasons Activities
	Study of Clocks, Learning Time

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Early Childhood	
Cultural (Geography, History, Natural and Physical Sciences)	
	Time Activities
	Timeline of a Child's Life
	Timeline of a Day
	Artists and History of Art
	Art Materials (various media and techniques)
	Musical Instruments
	History Activities
	Nomenclature Cards (cultural)
	Life Cycle of an Animal (e.g., frog, fish)
	Life Cycle of a Plant (e.g., pumpkin, seed)

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Suggested Materials List: Elementary

The American Montessori Society School Accreditation Commission and the AMS Teacher Education Action Commission offer you this list of suggested learning materials for the Elementary classrooms. The intent of this checklist is to provide Montessori schools and teacher education programs with a list of traditional, developmentally-appropriate materials and activities that students ages 6 through 12 years are generally expected to have available in their classrooms. This list is comprehensive but not exclusive or prescriptive and teachers may also present other activities.

There are three columns on each list. If a material is definitely EI or definitely EII, a mark has been placed in the appropriate column. If a material could be either 6 – 9 or 9 – 12, a mark was placed in the center (transition) column.

Elementary				
Math		E - I	Transition	E - II
	Materials for History of Math	x		x
	Quantity of Golden Bead Material	x		
	Quantity of Short Bead Stair Bars	x		
	(Arithmetic) Memorization Charts and Equations	x		
	Addition and Subtraction (Positive and Negative) Strip Boards	x		
	Addition Snake Game	x		
	Subtraction Snake Game	x		
	Multiplication Snake Game	x		
	Negative Snake Game			x
	Bead Cabinet & Arrows	x		
	Decanomial Materials (Decanomial Bead Bar Box, Cubes, Squares)	x		x
	Stamp Games	x		
	Division Boards	x		
	Small Bead Frame(s)	x		
	Large Bead Frame(s)	x	x	
	Hierarchical Material (Unit-Million)	x	x	
	Checkerboard (for multiplication)	x	x	
	Horizontal (Gold) Bead Frame(s)	x	x	
	Bank Game Cards(for multiplication)	x		x
	Test Tube Division	x		x
	Pegboard (for Multiples/Factors)	x		x
	Decimal Fraction Material	x		x
	Decimal Checkerboard			x
	Guide Squares			x
	Squaring and Square Root Pegboard			x
	Cubing Material			x
	Algebraic Trinomial			x

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Elementary				
Math		E - I	Transition	E - II
	Systems of Numeration (Bases) Materials			x
	Multi-Base Bead Frame			x
	Power of Two			x
	Power of Three			x
	Fraction Skittles and Insets	x		x
	Fraction Insets (angle measurement and percentages)	x		x
	Fractions (Parts of a Circle – working pieces)	x		x
	Materials for			
	Ratio and Proportion			x
	Principal/Interest/Rate/Time			x
	Velocity/Distance/Time			x
	Math Word Problems	x		x

Elementary				
Geometry		E - I	Transition	E - II
	Geometric Cabinet	x		
	Constructive Triangles	x		x
	Geometric Solids	x		
	Geometry Stick Material	x		x
	Classified Nomenclature	x		x
	Equivalency Material I – Square divided into rectangles and triangles	x	x	
	Insets of Equivalency for discovering area formulas			x
	Yellow Area Material			x
	Stand for Height of Triangle			x
	Theorem of Pythagoras plates			x
	Circle – Circumference and Area Materials			x
	Volume – Solid and Hollow Blue Shapes			x
	Volume box with 250 cubes			x
	Volume box with 1000 cubes			x
	Five Prisms			x
	Montessori Protractor/Instrument for Measurement of Angles	x		x

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Elementary				
Language		E - I	Transition	E - II
	Materials for the Study of the History of Language	x		x
	Comprehensive Phonetic Reading Program	x		
	Printed Bi-color Movable Alphabet	x		
	Phonetic Word Building Activities	x		
	Sandpaper Letters for Handwriting	x		
	Words to Pictures Cards	x		
	Sentences to Pictures Cards	x		
	Puzzle Words (Sight Words/Non-phonetic)	x		
	Command Cards:1, 2, 3 Actions	x		
	Word Studies Activities	x		x
	Mini Environments and labels	x		
	Grammar Boxes	x		x
	Grammar Symbols and Activities	x		x
	Sentence Analysis Charts and Boxes with Arrows for Sentence Analysis/Reading Analysis/Sentence Construction/Logical Analysis	x		x
	Material for Irregular Verbs	x		x
	Material for Verb Forms		x	x
	Materials for Conjugation of Verbs		x	x

Elementary				
Cultural (Geography, History, Natural, and Physical Sciences)		E - I	Transition	E - II
	GEOGRAPHY MATERIALS			
	Geography – Political			
	Puzzle Maps of Continents/Control Maps	x		
	Flags of The World and Stands	x		
	Nomenclature of the Flag	x		
	Physical and Political Pin Maps	x	x	
	Geography - Physical			
	Classified Nomenclature for Geography	x		x
	Geography Experiments supporting Impressionistic Charts	x		x
	Geography Impressionistic Charts:	x		x
	The Universe, The Solar System and the Earth	x		x
	Solar Energy and The Earth	x		x
	Movements of the Earth/Consequences	x		x
	The Atmosphere and Its Phenomena		x	x
	The Work of the Wind		x	x

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Elementary				
Cultural (Geography, History, Natural, and Physical Sciences)		E - I	Transition	E - II
	The Hydrosphere and its Phenomena		x	x
	Detailed Format for In-depth Study of a Country		x	x
	Economic Geography Charts		x	x
	Interdependence Activities		x	x
	Production/Consumption (Maps and Graphs)		x	x
	HISTORY MATERIALS			
	Coming of Humans	x		x
	Concept of Time	x		
	Day, Week, Month, Year, Year and its Parts, Seasons	x		
	Personal Time Lines	x		
	Clock Work	x		
	BCE and CE and/or BC-AD Time Line with Golden Bead materials, Century Label Cards, and selection of representative pictures	x		x
	Long Black Line (timeline)	x	x	
	Clock of Eras	x	x	
	Timeline of Life/Control and Mute	x		x
	Fundamental Needs of People: Timeline and selection of cards from several time periods/civilizations	x	x	
	Timeline of People		x	x
	Migration charts			x
	Timelines for the Study of Civilizations		x	x
	Timeline of Child's own Civilization/Country			x
	LIFE SCIENCE MATERIALS			
	Timeline of Life	x		x
	Zoology Material			
	Pictures of Vertebrates and Invertebrates for sorting and further classification	x		
	Classified Nomenclature of External Parts of Vertebrates (Wall Charts, 3 Part Cards, Booklets)	x		
	Classified Nomenclature of Internal Parts of Vertebrates (Wall Charts, 3 Part Cards, Booklets)	x		
	Animal First Knowledge Stories (picture, label, story)	x		
	Animal First Knowledge Questions and Answers	x		
	Five Kingdom/Animal Kingdom Classification Charts	x		
	Classified Nomenclature of Invertebrates	x		

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Elementary				
Cultural (Geography, History, Natural, and Physical Sciences)		E - I	Transition	E - II
	Five Kingdoms Chart/Domains of Life	x		x
	Five Kingdoms/Domains of Life Material		x	x
	Comparative Functions of Animal Systems			x
	Great River Materials (study of human body)			x
	Tree of Life Chart/Materials			x
	Botany Material			
	Botany Classified Nomenclature for: Plant, Roots, Stem/Trunk, Leaves, Flowers, Fruit, Seed	x		
	Botany Impressionistic Charts	x		
	Plant First Knowledge Stories (picture, label, story)	x		
	Plant Classification Charts		x	x
	Plant First Knowledge Questions and Answers		x	x
	Advanced Botany Classified Nomenclature for more specific parts of the parts of the plants.			x
	Materials for Botany Experiments	x		x

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In addition to the Montessori materials, a quality Montessori school has the following...

Elementary				
Practical Life, Arts and Crafts		E - I	Transition	E - II
	Practical Life	X		X
	The Arts	X		X

Elementary				
Sensorial		E - I	Transition	E - II
	Peace Education	X		X

Elementary				
Language		E - I	Transition	E - II
	Access to a library for research and pleasure reading (classroom or school)	X		X

Elementary				
Cultural (Geography, History, Natural, and Physical Sciences)		E - I	Transition	E - II
	Land Forms	X		

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AMS PATHWAY HANDBOOK

The American Montessori Society School Accreditation Commission and the AMS Teacher Education Action Commission offer you this list of suggested learning materials for the Secondary classroom. The intent of this checklist is to provide Montessori schools and teacher education programs with a list of traditional, developmentally-appropriate materials and activities that students ages 12 years – 18 years are generally expected to have available in their classrooms. This list is comprehensive but not exclusive or prescriptive and teachers may also present other activities.

Suggested Materials List: Secondary

Secondary	
Math	
	"The Teacher"
	Any books (print, e-books, audio), software programs, materials and supplies that are required for his/her curriculum development. Available hands on materials for demonstration.
	Materials for students to create their own individual and group projects

Secondary	
Language	
	"The Teacher"
	Books (print, e-books, audio), software programs, materials and supplies that are required for curriculum development. Library of appropriate novels, short stories, literary essays/non-fiction, and poetry.
	Materials for students to create their own individual and group projects.

Secondary	
Science/Arts/Social Studies/Self-Construction	
	"The Teacher"
	Materials for students to create their own individual and group projects
	Books (print, e-books, audio), software programs, materials and supplies that are required for curriculum development. Applicable lab space, materials and equipment for sciences.
	Tools and equipment for the complete adolescent experience, as appropriate to the school and program in areas such as land lab experience, student run businesses, intersessions, health, and electives: gardening, cooking, animal care, carpentry, camping/hiking, music, arts, handcrafts, reality babies (infant simulator), etc.

In addition to the Montessori materials, a quality Montessori school has the following…

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Secondary	
Supplementary Materials	
	Access to appropriate technology for students to do word processing, data analysis, presentation development, publishing, recording, displaying, and sharing information
	Printer
	LCD Projector/Apple TV or other similar technology
	Video camera
	Large white boards or blackboards
	Kitchen and water access
	P.E. equipment and indoor/outdoor athletic field/gym/court access
	Community meeting space
	Appropriate shelving for materials
	Lockers or other student storage.
	Various working and seating spaces – such as chairs, small tables, couches, “Back Jacks”, pillows for floor seating, seminar tables.
	Materials and equipment for student care of the environment.

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AMS PATHWAY HANDBOOK

Appendix #6

List of Regional Accrediting Agencies

The AMS School Accreditation Commission strongly encourages schools to consider cooperative accreditation with AMS and with a regional association. It is important that Montessori schools be recognized in the broader educational community for their commitment to excellence and child-centered practices. It is also important that non-Montessori educators see first-hand the quality education available to children in Montessori schools.

The cooperative accreditation process is seamless. Schools complete one self-study, they create one strategic plan, and they have one onsite visit. For more information, please contact the AMS Office of School Accreditation, 212-358-1250, and your regional association.

Here is a list of regional agencies in which we offer cooperative accreditation:

- AdvancED (www.advanc-ed.org)
- Association of Independent Maryland & DC Schools (www.aimsmddc.org)
- Association of Independent Schools in New England (www.aisne.org)
- Association of Independent Schools of Florida (www.aisfl.com)
- Association of Colorado Independent Schools (www.acischools.org)
- California Association of Independent Schools (www.caisca.org)
- Connecticut Association of Independent Schools (www.caisct.org)
- Florida Council of Independent Schools (www.fcis.org)
- Hawaii Association of Independent Schools (www.hais.org)
- Independent Schools Association of the Central States (www.isacs.org)
- Independent Schools Association of the Southwest (www.isasw.org)
- New England Association of Schools and Colleges (www.neasc.org)
- New Jersey Association of Independent Schools (www.njais.org)
- New York State Association of Independent Schools (www.nysais.org)
- Middle States Association of Colleges and Schools
    - Middle States Commission on Elementary Schools (www.msa-css.org)
    - Middle States Commission on Secondary Schools (www.msa-css.org)
- Northwest Association of Independent Schools (www.nwais.org)
- Pennsylvania Association of Independent School (www.paispa.org)
- Southern Association of Independent Schools (www.sais.org)
- Virginia Association of Independent Schools (www.vais.org)
- Virginia Council for Private Education (www.vcpe.org)
- Western Association of Schools and Colleges (www.acswasc.org)

If you are interested in becoming dually accredited by AMS and another agency not listed here, please reach out to us with more information. We are always looking to forge new partnerships.

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AMS PATHWAY HANDBOOK

Appendix #7: Initial Accreditation STEPS & TIMELINE

The following timeline is based on an average projection frr a school deciding to become accredited after achieving Step 6 on the Pathway and should be used only as a guide when creating a timeline specific to your school. Dues listed are for the 2019-2020 school year.

Initial Planning

Approximately 36 months from projected accreditation date

- School receives Pathway Step 6 recognition.
- School reviews the AMS Accredited School Standards & Criteria to determine readiness and eligibility for accreditation.
- School orders the Accreditation Information Packet ($130).
- School participates in the Accreditation 101 Webinar (complimentary with purchase of Accreditation Information Packet)

Accreditation Application, Candidacy, and Self-Study Process

20 to 30 months from accreditation

- School submits the AMS Application for initial accreditation, all required documentation, and Fee ($750 plus additional $650 for each satellite site).
- *School contacts both AMS and the cooperating agency if plans are to engage in a cooperative process.*
- AMS Office of School Accreditation reviews the Application and approves accreditation candidacy. School receives written notification of the decision.
- School participates in the Accreditation Self-Study writing teleconference if candidacy is approved.
- School engages the entire school community in the Self-Study process, culminating in the Self-Study Report.

12 to 18 month process

Self-Study Report Review

8 to 13 months from accreditation

- School submits the Self-Study Report along with the Review Fee ($240) to the AMS Office of School Accreditation.
- *July 1 in order to host a fall Accreditation Onsite Visit*
- *October 1 in order to host a spring Accreditation Onsite Visit*
- AMS Office of School Accreditation reviews the Self-Study Report for completeness and requests revisions as necessary.

Onsite Visit Coordination

6 to 8 months from accreditation

- AMS Office of School Accreditation contacts the school to identify potential dates for the Accreditation Onsite Visit.
- AMS Office of School Accreditation appoints a Team Chair and Team Members to the Accreditation Onsite Team from the pool of qualified volunteers.

Onsite Visit and Team Report Review

4 to 6 months from accreditation

- School hosts the Accreditation Onsite Visit, during which the Accreditation Onsite Team verifies the school's compliance with AMS Standards & Criteria and validates content of the Self-Study Report through observations, interviews, and document review.
- Accreditation Onsite Team summarizes its findings in a Team Report, which is submitted to the AMS Office of School Accreditation within one month of the conclusion of the Accreditation Onsite Visit.

School Accreditation Commission and AMS Board of Directors Review

2 to 4 months from accreditation

- AMS Office of School Accreditation and a Member of the AMS School Accreditation Commission review the Team Report.
- AMS Office of School Accreditation schedules the school's review at an upcoming School Accreditation Commission Meeting; there are 3 school review meetings per year - in *January, July, and October*
- School Accreditation Commission Members review the school and vote to:
- recommend the school for AMS Accreditation to the AMS Board of Directors **OR**
- defer school accreditation until the school demonstrates full compliance with AMS Standards & Criteria.
- Members of the AMS Board of Directors review the recommendation of the School Accreditation Commission and vote to award school accreditation or deny school accreditation.

Accreditation Decision Notification

1 month from accreditation

- AMS Office of School Accreditation notifies the school of the final decison of the AMS Board of Directors. If the school has been awarded AMS School Accreditation, an Accreditation Certificate will be issued.

4 to 20 week process

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Appendix #8

Guidelines for the School Preparing for an Onsite Visit

Hospitality

Your school has just completed a very thorough self-study report, everyone has been engaged, and the school has invited a visiting team of professionals to verify the school's findings. Preparation for this visit will enhance the success of the school's experience and enable the work of the onsite visiting team. A very important aspect of this preparation is hospitality.

The school must provide for the food, travel, and housing of the team. These arrangements can be made with the visiting team chair's input. In housing team members, the school should try not to assign two to a room. The team member's task is very exhausting. When the long days end, most team members need rest and deserve privacy.

Team members who live within commuting distance of the school are not required to stay away from home overnight. However, since at least two evening meetings are held during the visit, commuting time should be limited to 30 minutes.

The visiting team must have access to a private conference area in the school and where they are staying.

Most schools welcome the team with a school tour followed by an informal reception or dinner for the visiting team attended by the faculty, steering committee, administration, board members, parents, and occasionally representative students. At this reception, the head of the school or another school official gives a brief overview of the school's mission, philosophy, and unique aspects of its programs. This reception is often done at the school and combined with a school tour for the visiting team. A formal dinner may be the choice for a school following their traditions, but it is certainly not necessary. A punch and cookie reception offers the same warm welcome that is needed. Please limit the tour and reception/dinner to no more than two hours. The objective of the reception is to initiate relations, allow people to recognize one another, and then let the team get on with the evaluation.

Arrangements for housing and local transportation are coordinated with the team chair as are the times of the school tour and the reception/dinner.

The team members will have specific responsibilities to carry out. Not every accreditation team member needs to attend every meeting. All employees should be available to talk with a member of the visiting team if requested. Some of these meetings may be done in groups, but most should be one to one. A master checklist of employees and job titles (including photos if possible) as well as individual schedules should be provided so accreditation team members can keep track during these meetings.

During the onsite visit, the school should designate one contact person for the team's support. This person will be responsible for things like securing any missing supplies; helping the team find documents; and introducing team members to parents, students, and staff.

Every aspect of the school day from early morning arrivals through pick up at the end of the day needs to be observed. Sports practices, games, and faculty meetings, if any, should be observed if possible.

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A Well-Prepared Faculty

The self-study report is the main tool for the onsite evaluation. The visiting team enters the school through the self-study report and follows the paths that are presented in the report. Then the team builds its own commentary on the self-study report. Sometimes the team knows more about the school than the faculty does. This happens when sub-committees develop the self-study report and members of the sub-committees know their portion well, but are not familiar with the other portions of the study. In order to prepare to be interviewed by the onsite visiting team, the faculty should be aware of the whole self-study report.

When the visiting team members observe in classrooms, they hope to see classrooms that demonstrate the philosophy of the school. They will observe the tone and teaching style and interaction between teacher and students. Each teacher should expect a visit from any members of the team with one visit lasting at least 30 minutes. Every class will be visited but not every team member will be able to visit each and every class due to the enormity of the tasks and responsibilities that need to be completed during the short time available for the onsite visit.

Most conversations between visiting team members and faculty involve the philosophy and school community. The faculty ought to:

- Be "mission conscious"
- Know the school's philosophy
- Understand the school community, especially the students (ethnicity, family structure, religions, social organizations, and cultures represented in the student body)
- Be aware of concerns that the school community needs to address—be familiar with areas of strength and areas for improvement the school identified in its self-study

List of Supplies for the Onsite Team

- Computer equipment as prearranged with team chair (please make sure the team's work room has enough electric sockets/surge protectors for the team to plug in their laptops/devices)
- Internet access
- Supplemental computer equipment organized for easy access (e.g., printer, copier)
- Computer supplies (e.g., printer paper, surge protectors, projector if requested by team chair)
- Extension cords
- Flip charts and markers
- Masking tape
- Pencils, pens, highlighters
- Pads of paper
- Post-it notes
- Nametags worn by all employees and visiting team members throughout the visit
- Plenty of non-alcoholic beverages, water, and healthy nibbles for snacking
- One contact person if the team needs clerical assistance
- A short list of nearby restaurants, drugstores, etc.

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Items to Have on Hand for the Onsite Team

Files of required documents should be organized and easily accessible to the onsite visiting team. In preparation for the team's review, it is helpful to gather all supporting documentation in one place and create boxes of files (or binders) tabbed with the Standard number and the title of the enclosed document. Alternately, it is recommended that documents be stored electronically (such as on a Google Site) and made available to the visiting team members prior to the onsite visit for ease of review and verification.

The following list is a guide for schools to use in preparing for the team visit but it is not an all-inclusive list. A school may include additional documents that may assist the team.

A. Prepared within a folder for each team member:
   1. All schedules pertaining to the team's visit (e.g., daily and weekly schedule for each class, daily school schedule, individual schedules of the teachers and administration personnel, interview schedule, special programs)
   2. Map of the campus and floor plan of the building(s), labeled with classrooms and teachers' names
   3. An index or business card with the school's address and contact information
   4. A roster of teachers for each class (can be included with the class schedule) along with number of students and age range
   5. A list of all school personnel including job titles (organized by job categories)

B. In addition to an updated AMS Standards and Criteria Verification Checklist and a copy of the school's self-study, the following documents should be organized in files (electronically is recommended) for whole team's review**.** Lastly, be sure to have a copy of the local/state licensing regulations cited in your checklist

Standard 2
- Board member roster with occupation, relation to school, committees
- By-laws of school board
- Current strategic plan
- Student attrition report

Standard 4
- Student assessment information/ progress reports/ portfolios

Standard 5
- Job descriptions
- Example of teacher contract and benefits package
- Evidence of evaluations of faculty and staff by head of school (can be anonymous)
- Personnel policies and procedures

Standard 7
- Yearly operating budget
- Scholarship/ financial aid forms

Standard 8
- Written safety and disaster plan
- Children's records
- Fire/health/safety inspections
- Attendance sheet
- Staffing and student attendance patterns for each class
- Children's illness policy
- Resource file for community referrals
- List of parents
- Demographic information about the students and community

Standard 9
- Employee Handbook or Policy Manual
- Parent Handbooks
- Discipline policy
- Child abuse policy
- Public relations articles, invitations
- Most recently completed parent survey results
- Enrollment package for new families

Reimbursement of Onsite Team Members

The school communicates the process for reimbursement of all travel, food, and related expenses prior to the team's departure and promptly reimburses each individual for his or her personal expenses related to the accreditation visit.

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SAMPLE ONSITE VISIT SCHEDULE

The team chair and head of school should work collaboratively to arrange the visit schedule approximately 6 weeks prior to the visit

4-Day Visit

First Day: Arrival and Orientation of Onsite Team

2:00 p.m.	Arrival of team, check-in at place of lodging
3:00-4:30 p.m.	Introduction/orientation team meeting
5:00-7:00 p.m.	School tour and reception
7:30-9:00 p.m.	Team planning meeting (at the hotel)

Second and Third Day: Observations, Interviews and Meetings

7:30/8:00-noon	Observations, document review, team meetings Observe drop-off
Noon-1:00 p.m.	Lunch with faculty or another constituent group
1:00-4:00 p.m.	Observations, document review, team meetings, continue working on the team report Observe pick-up
4:00-6:00 p.m.	Interviews: administration/staff/parents/students/alums/etc.
6:00-9:30 p.m.	Working Dinner meeting and team meetings

Final Day: Additional Data Collection and Reporting

7:30/8:00-noon	Final visits or re-visits, with emphasis on areas of question
Noon-2:00 p.m.	Working team lunch and meetings—final review of sub-committee reports, agreement on recommendations/commendations Exit interview with head (Team Chair and one other member)
3:30-4:00 p.m.	Oral exit report to head (and others at head's discretion) by Team Chair
4:00 p.m.	Team members depart immediately after the report (it is not appropriate to have a discussion or question/answer session at this time)

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AMS PATHWAY HANDBOOK

Sample Detailed Visiting Team Schedule

Day	Activity	Time	Notes	Who
Sun.				
	Visiting Team Members Arrive	various	Confirm transportation to hotel	
	Visiting Team Orientation Meeting	3:30 – 4:30pm	Hotel; van pick up at 4:30pm	
	Tour of School	4:45 – 5:15pm	School	
	Dinner with staff, Board, and Steering Committee	5:30 – 7:00pm	Board Secretary's home	
	Interview: Board of Trustees	7:00 – 8:00pm	Interview follows dinner	
	Visiting Team Meeting	8:30 – 9:30pm	Hotel	
Mon.				
	Arrive at school/Set up work space/Observe arrival	8:00 – 8:30am	Drop-off is 8:15 – 8:35am	
	Classroom observations / Document Review	8:00 – 11:00am	T & EC half-day dismissal occurs at 11:15am	
	Visiting Team Lunch (Note: Lunch will be ordered and in work space at 11:30. Team members may take lunch with them to the elementary classrooms or eat after student interviews.)	11am – noon	Team members join elementary students for lunch & interviews: • Upper El (11 – 11:30): E1 & E2 • Lower El (11:30 – noon): E4 & E5	
	Classroom & Enrichment Class observations/Document Review (continued)	12:30 – 3:00pm	Dismissal: 3:15 – 3:35pm	
	Interview with Parents	2:30 – 3:30pm		
	Observe Extended Day program; Document Review (continued)	3:30 – 5:00pm		
	Interview with HOS & Business Manager	4:00 – 5:00 pm		
	Visiting Team Dinner Break		On your own; team's choice	
	Visiting Team Meeting	7:30 – 9:00pm	Hotel conference room	
Tues.				
	Observe drop-off (if not observed on Monday)	8:15 – 8:35am		
	Classroom observations /Document Review (continued)	8:30 – 11:30am		
	Visiting Team Lunch (will provide menu, get orders, and deliver!)	11:00 – 11:30am		
	Interview with Enrichment Team	11:30 – noon		
	Interview with Administrative Team	12:30 – 1:30pm		
	Observe classrooms (including enrichment classes) continued	12:30 – 3:00pm	Meet with individual teachers (as needed-arrange with Team Chair)	
	Observe pick up (if not observed on Monday)	3:15 – 3:30pm		
	Interview with classroom teachers	3:30 – 4:30pm	Recommend separate meetings with T, EC, and EL Teams.	
	Interview with Leadership Team (HOS & AHOS)	4:30 – 5:15pm		
	Dinner Break		On your own: team's choice	
Wed.				
	Complete classroom visitations/document review/turn in receipts/work on report	8:00 – 11:45am		
	Preview oral report to HOS & AHOS	11:30 – noon		
	Lunch	Noon – 12:45pm		
	Present oral report	12:45pm	Board, Admin Team, Steering Comm.	Team Chair
	Leave for airport	1:00pm	Confirm transportation	

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Appendix #9

Characteristics of Montessori Programs

Characteristics of a Montessori Infant/Toddler Program

Maria Montessori's careful observations and in-depth studies are the foundation for Montessori Infant and Toddler Programs which emphasize the importance of meeting both the physical, social-emotional and cognitive needs of very young children from an early age. Montessori programs foster the growth and development of very young children by providing them with unique environments for living and learning, with specially trained caregivers who have a deep practical and philosophical understanding of children at this age level.

Developmental Characteristics of Infants and Toddlers (Birth to age 3)

During the first three years of life the child is developing more rapidly than at any other time. This applies not only to physical and language development but also to brain development. Data collected by the Rauch Foundation concluded that nearly 85% of a child's brain development occurs by the age of three years. Specific sensitive periods in a child's life create optimal windows of opportunity for the development of new abilities in favorable circumstances. The sensitive periods for movement, language, and order have a significant impact on development in the early years.

From random, uncontrolled movements the infant acquires purposeful, coordinated ones. Gross-motor coordination develops as the child moves from lying down to rolling over, crawling, and finally standing upright and walking. Fine-motor skills are developed as the child reaches for and handles a variety of objects. Motor development plays a profoundly important role in overall development. The quest for movement represents the first step towards achieving personal independence and autonomy, increasingly enlarging the young child's field of action and cognition.

The child is also acquiring language, beginning with development of the auditory system and receptive language skills. Infants understand much of what is being said long before they utter their first words. As they develop expressive language skills, children progress through several distinct stages, including crying, babbling, and uttering first words. By the age of three, most children can speak in complete sentences, express their wants and needs, and carry on conversations with an adult.
The sensitive period for order is evident at birth as the newborn child responds to daily routines. These routines reflect the structure provided by the adults in the child's life as they respond respectfully to the child's needs and maintain an orderly environment. As children get older and become more independent, they naturally seek and create order in their surroundings, strengthening their internal cognitive processes as the capacity for conscious thought emerges.

Philosophical Background

We should try to understand that there is an intelligible reason behind a child's activities. He does nothing without some reason, some motive.

Montessori, Maria, The Secret of Childhood

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Maria Montessori referred to this period in a child's life as the stage of the unconscious absorbent mind, when children have the innate drive and capacity to absorb large amounts of information from their environment effortlessly and without conscious thought. Through self-initiated efforts they learn to walk and talk simply by observing and imitating what they see around them. This learning process stimulates further brain development. In order to maximize development, children need plentiful opportunities to engage in positive, ongoing, experimental interactions with the environment. Since young children learn through physical, sensory, and emotional interactions with their caregivers and their environment using their hands, mouths, and bodies, the adult cannot "teach" the child directly. It is with this in mind, that a specialized Montessori environment is designed and created to be responsive to the developmental needs and sensitive periods of child development.
In this child-centered approach the nurturing adult encourages the child's spontaneous activity, in an environment which is carefully designed and prepared to meet the interests and needs of each child.

Program Models and Age Groupings

Multi-age groupings are an essential characteristic of all Montessori programs. Children from birth to age 3 may be grouped in varying multi-age configurations that promote social interactions with children of different ages, and mirror the social dynamics of the world outside of the classroom, including intergenerational family dynamics.
A typical program model at the Infant and Toddler level offers two age-groupings:

a) Infants - approximately 6 weeks to around 15-18 months (or when walking)
b) Toddlers - from around 15-18 months (or when walking) up to 3 years

Transfers to an older age group should be made based on a child's developmental profile rather than the child's age or the school calendar. Normally, children will transfer to the Montessori early childhood classroom some time between the ages of 2 1/2 to 3 years.

Schools that offer Montessori programs for infants and toddlers may provide the following:

Parent-Child Class: A Montessori Parent-Child class provides an environment in which parents and their children interact alongside a Montessori-trained teacher who prepares the environment to encourage exploration, and facilitates interactions. The Parent-Child class encourages parents to support their child's discovery and investigation of the learning environment on their own, and allows parents and children to experience an environment set up which encourages development of movement, acquisition of language, and refinement of visual, auditory, and tactile perception.

Infant Class: A Montessori classroom for infants, sometimes referred to as "The Nido" (Italian for "nest"), accommodates infants in a peaceful environment, where babies can safely explore and feel secure. The prepared environment for infants is furnished to avoid unnecessary restrictions on the infant's spontaneous movement and budding independence, with individual floor beds/mats or cribs, and infant-sized tables and chairs. Specialized equipment may include bars that babies use for pulling-up, low stairs for climbing practice, and an array of objects for sensory and manipulative exploration.

Toddler Class: A Montessori classroom for toddlers is designed to support the drive to do things for themselves, developing self-confidence and a sense of efficacy. The safe, structured environment enables children to work collaboratively and independently, explore freely, and express their curiosity. The adults speak clearly and carefully, providing an enriched spoken language environment so that children have strong language models and learn to express their needs.

The Classroom Environment

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> *Just as a physical embryo needs its mother's womb in which to grow, so the spiritual embryo needs to be protected by an external environment that is warm with love and rich in nourishment, where everything is disposed to welcome, and nothing to harm it.*
>
> Montessori, Maria, The Secret of Childhood

Infants and toddlers have freedom to explore in safe environments that provide freedom for unrestricted physical movement and are visually attractive, organized, tidy, clean, and uncluttered. Manipulative materials foster concentration, problem solving, and a sense of achievement and are fully accessible to the children on low, open shelves. The variety of interesting materials combined with the child-sized utensils and furnishings make it possible for children to select and complete activities independently. An essential component is a self-care area where toilet awareness and independence in maintaining personal hygiene is encouraged.

Curriculum

The routines of everyday living are the foundation of Montessori curriculum for both infants and toddlers, and all activities promote the development of order, coordination, concentration, and independence, while nurturing social, emotional, physical, and cognitive growth. Based on daily observations by the teachers, new materials and activities are introduced that meet the needs of individual children and the community as a whole. These activities are designed to allow the child to recognize when a task has been completed successfully, or to correct an error without adult intervention, all the while permitting multiple repetitions of an activity, if desired:

- Self-care: washing, dressing, toileting, and eating according to each child's individual capacity
- Care of the environment: cleaning, food preparation and meal time; plant care and animal care, etc.
- Large-motor activities (indoors and out): walking, stepping, climbing, running, spinning, jumping, balancing, pulling up on bars, climbing steps, carrying heavy objects, etc.
- Fine-motor skills: reaching, grasping, picking up objects, transferring objects, using tools and utensils, art work, etc.
- Language: naming objects, describing actions and intentions, discussing pictures, conversation, visual and auditory perception, music, singing, finger-plays and looking at and reading books with the teachers
- Social: developing manners and appropriate social skills through spontaneous interactions throughout the day as well as in adult-led small group games.
- Outdoor experiences: nature walks when the adults accompany children at their own pace, cultivating the children's interest and wonder in the natural world, and laying the foundation for a deep respect for nature.

Daily Schedule

An uninterrupted work period ensures that children have the time to settle into tasks that interest them, and that their concentrated efforts are not interrupted. The daily schedule reserves long, uninterrupted periods of time for spontaneous activity when children are free to choose their own activities. Their independent and spontaneous work is supported by the Montessori educator through thoughtful guidance and engagement and age-appropriate help. Whole group activities, such as outdoor play, group meals, or adult-led story time and singing are scheduled outside this uninterrupted period. Infant and toddler sleep time is according to individual need.

Role of the Teacher at the Infant/Toddler Level

> *… the child does not want to get anywhere; he just wants to walk, and to help him truly, the adult must follow the child, and not expect him to keep up. The need for following the child is clearly demonstrated here, but indeed it is the rule for all sides of education and in all fields.*

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The child has his own laws of growth, and if we want to help him grow, we must follow him instead of imposing ourselves on him.

Montessori Maria, To Educate the Human Potential

Lead Teachers

Credentialed Montessori teachers have completed a highly specialized course of training at the age level and are viewed as facilitators and guides, rather than as teachers who provide direct instruction. Montessori Infant & Toddler credentialed teachers have in-depth knowledge of child development from birth through 3 years of age, and possess an intimate knowledge of Maria Montessori's philosophy for meeting the needs of this age range. The teacher has an understanding of the specific activities that should be provided to each child based on his or her unique stage of development and observes individual children and the dynamics of the group like an anthropologist. These observations are the basis for careful recording of each child's activities, behaviors, knowledge, and skills. These records then become a document of the child's activities and progress. Using these along with developmental checklists, the teacher knows which activities to offer next to each child, and where there may be areas of strength or weakness.

All adults in the environment contribute to making the classroom **a peaceful community** in which respect for the independence and character of each child is paramount. Adults move slowly, and are consistently calm, gentle, soft-spoken, patient, and trusting. They demonstrate respect and compassion, using eye contact, kneeling to the level of the child, addressing children by name, and speaking before touching or moving them. The classroom environment provides a calm, soothing atmosphere, with consistent caregivers who create an emotional safe haven for those in their care. To cultivate a growth mindset, teachers focus on acknowledging each child's efforts without using praise or punishment.

Classroom Assistants

Most schools employ classroom assistants who provide support to both teacher and children. The assistant is often trained on the job, though some assistants may have attended training courses or workshops. Sometimes, this position is filled by an intern who is enrolled in a Montessori teacher education program.

Adult/Child Ratio

State licensing requirements determine minimum adult/child ratios, and these are fully adequate for the needs of a Montessori classroom. In fact, it is desired that Montessori classrooms have a higher adult/child ratio, as this fosters independent learning, and encourages children to learn from their multi-aged peers.

Role of the Family

When an infant or toddler joins a Montessori community, it is often the parents' first experience leaving their child in the care of another adult outside the family. The teacher seeks to establish a strong partnership with parents and other adult caregivers in the child's life, and to help families understand ways to provide an optimal home environment. Parents can expect to be invited to observe the Montessori class in action, and regular parent/teacher conferences provide opportunities for dialogue, to assist both parents and teachers in understanding the child's interests, activities, and skills. Parents are encouraged to take advantage of parent education opportunities the school provides which often include discussions about ways the Montessori approach may be implemented and supported at home, and also to become familiar with the school, the program, teachers, and other children in the program. Parents should be involved and engaged in their child's education and maintain an open dialogue with the teachers about their child and their family life, as teachers can better support each child's unique needs when they better understand the other

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aspects of the child's life. When parents develop a sense of trust and comfort with the school they are better able to communicate to their child a positive attitude about going to school each day.

Characteristics of a Montessori Early Childhood Program

Montessori programs embrace the educational principles and practices developed by Dr. Maria Montessori based on her extensive observations of children and her deep insights into the goals of education. The Montessori approach has inspired the creation of Montessori schools world-wide, offering a unique approach to education that respects the individuality of each child within the classroom community, while fostering personal and social growth through a comprehensive range of age-appropriate developmental activities.

Developmental Characteristics of the Child aged 2 1/2 to 6 years.

> *The human hand, so delicate and so complicated, not only allows the mind to reveal itself but it enables the whole being to enter into a special relationship with its environment*.
>
> Montessori, Maria, The Secret of Childhood

Around the age of three, children develop a conscious awareness of their perceptions and actions that allows them to direct their attention more deliberately, to begin to share their thoughts, and to build conscious memories. During the next three years, developmental sensitive periods are observable that guide the children's spontaneous activity and serve to optimize their physical and mental growth. For example, children ages three to six are strongly attracted by opportunities to exercise and refine large-motor movements such as running, skipping, or balancing on a low wall. They touch everything within their reach and are fascinated by very small objects and fine details, contributing to refinement of their fine-motor coordination and sensory perception. It is especially important to recognize that children at this age level welcome order, ritual, and repetition, and are easily disturbed by unexpected changes in routines or places. Language development at this age is notable for the acquisition of a large vocabulary along with internalization of the fundamental structures of the spoken language. Written words spark curiosity and stimulate interest in learning to write. The child's increased ability to communicate verbally supports the growth of cooperative social relationships with other children and adults, and parallels an interest in learning social manners. Young children learn through independent, self-chosen hands-on activities, for the sake of the process rather than the product, and their self-esteem and self-confidence grows as they acquire real and recognizable skills. They have an extraordinary capacity for learning.

Philosophical Background

> *A child is a discoverer. He is an amorphous, splendid being in search of his own proper form.*
>
> Montessori, Maria, The Secret of Childhood

Montessori emphasized that the goal of education is two-fold, to support the full development of individual potential and to support each individual in becoming a contributing member of society. An education for life addresses physical, social-emotional and character development as well as academic skills and knowledge and career readiness. Montessori programs are planned to be responsive to the developmental stage of the children, and value self-confidence, independent thought and action as well as cooperation and respectful collaboration with others. In the preschool years the emphasis is on supporting the full development of the child's individual potential.

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Multi-Age Grouping

Multi-age groupings are essential for a Montessori program. The early childhood program integrates a three-year mixed age group of children aged approximately 2.5 years to 6 years. Optimally, one third of the group changes each year, as the oldest children move on and a new group enters. When children stay in the same environment for three years, the bonds and understanding between child and teacher are significantly strengthened; the children's sense of security gives them confidence to explore, and over time they grow in independence as they initially observe and learn from older children and later become role models and leaders of the group, ready to help the younger children who have just joined the class.

The Classroom Environment

> *What is most characteristic of our system of education is the emphasis placed upon the environment.*
>
> Montessori, Maria, The Secret of Childhood

The classroom is designed to be more like a home than a school, with the space divided into room-like areas for each curricular area. In this "children's house" all furniture, tools and utensils are child-scale. Close attention is paid to the organization and maintenance of the environment, so that it is always clean, consistent, and orderly, with flowers, houseplants and decorative items contributing to its aesthetic beauty. As in a home, specialized areas are needed. A "kitchen" area allows children to prepare food and store cleaning supplies and a cozy area offers a place to rest or look at books. An adjacent bathroom also has child-scale fixtures, and direct access to an outdoor garden is highly desirable.

The curriculum is implemented through an extensive array of materials and equipment that are easily accessible to the children on low, open shelves. The classic Montessori materials for this age level are arranged in a logical progression in each curricular area. These materials are exceptionally well-designed, high quality educational manipulatives that encourage concentration and attention, refinement of motor skills, pattern recognition, formation of abstract concepts and development of executive function. An important feature of each material is control of error; success is self-evident to the child when the activity is completed. In addition, the materials permit repetition and practice of each activity until mastery is achieved. Supplemental materials are designed to similar standards of quality and precision.

This prepared environment provides a safe haven for children to explore all aspects of the three-year curriculum at their own pace. The children have the freedom to select the activities of their choice, the right to work with a material for as long as they wish at a table or on a floor mat, and the responsibility for replacing things as they found them. They develop the patience to wait for a material to become available, and they interact with other children and adults throughout the day, seeking adult assistance only as needed.

Curriculum

> *They were attracted by these objects which perfected their sense perceptions, enabling them to analyze and facilitate their movements. These materials also taught them how to concentrate in a way that no vocal instruction ever could have done.*
>
> Montessori, Maria, The Secret of Childhood

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The curriculum is organized into areas with a particular content focus, but all areas support the development of large and fine motor skills, sustained concentration, a sense of order, individual choice and decision-making, self-regulation, self-confidence, independence, responsibility and cooperation. Most activities involve manipulative materials, and the use of each material is usually first demonstrated by the teacher to individual children. Each activity builds on previous learning, and the teacher presents materials in sequence so that each new challenge for the child represents a small additional challenge and promises a high probability of success. It is expected that children will choose to repeat activities until they have mastered that concept or skill. In all areas, the children proceed through the three-year curriculum at their own pace, with teacher guidance and support. The curriculum includes the following areas:

Practical Life
Daily activities and exercises assist the child in developing functional independence, social awareness, self-confidence and personal dignity by practicing the routine tasks and events of everyday living. Activities involve self-care (e.g. dressing, washing, tooth-brushing), household/classroom maintenance (e.g. dusting, sweeping, scrubbing, polishing, dish-washing, cloth-washing), food preparation and service, gardening, and polite social manners (e.g. greetings, thanks, invitations, apologies). These real-life experiences are a physical and mental preparation for the other areas of the curriculum, as well as an ongoing contribution to the classroom community.

Sensorial
Specialized Montessori materials are designed to engage the child in matching and grading exercises which demand the use of a single isolated sense (sight, hearing, touch, taste, and smell) to consciously discriminate qualities, similarities and differences of size, length, shape, weight, color, sound, tones, smells, and flavors, and to organize the materials accordingly. After the child demonstrates the ability to perceive the varying qualities of the materials, the teacher introduces the vocabulary for these qualities (e.g. large/small, loudest/softest, words for colors and shapes, etc.). These experiences provide an introduction to pattern recognition and classification, and validate the child's ability to make decisions based on the evidence of the senses, laying the foundation for learning in the academic curricular areas.

Math
Number concepts are introduced using manipulative materials at every stage. Numerals are introduced after the child has experienced the qualitative differences of quantities from 1 to 10. Early exploration of number includes odd and even numbers, and number sets. Place value up to 9,999 is demonstrated using golden bead materials that represent thousand, hundreds, tens and units, allowing children to trade and perform operations with large quantities. Colored bead bars and chains representing the squares and cubes of all the numbers from 1 to 10 offer experiences in linear counting from 1 to 1,000. Numerical relationships are absorbed at the same time. Additional materials support memorization of basic number facts as children perform simple addition, subtraction, multiplication and division, creating their own tables.

Language
Oral/Auditory/Expressive: The Montessori environment is language-rich. Teachers model thoughtful, calm speech in all their interactions and children engage in conversations throughout the day. Everyday conversational vocabulary is significantly enlarged with the specific terminology used in the other curriculum areas.
Writing and Reading:
Tracing a variety of simple metal insets and making designs offers children multiple opportunities to develop pencil control before attempting to form letters. Sandpaper letters are then used to

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introduce the child to tracing the outline of the letter and simultaneously vocalize the most common phonetic sound represented by that letter. Follow-up exercises with movable letters allow the child to form written words and sentences based on analyzing the sounds within each word. At the same time, whole word reading is developed by exercises such as attaching labels to items from a box of objects, or to furnishings in the room. A sequence of exercises follows, including lessons that clarify phonograms and irregular spellings. A small classroom library and carefully selected phonetic readers offer additional reading practice and enjoyment.
Introduction to Grammar: The older children enjoy simple games that emphasize the parts of speech. The differences between a naming word (noun) and doing word (verb) are made clear when the child is asked to bring something or do something. The roles of adjectives and adverbs are clarified when the child is asked to bring a specific colored pencil or to walk in a specific way. Additional exercises are available, introducing grammar symbols for parts of speech, boxes of word cards, and sentence analysis charts.

Cultural Knowledge
The cultural curriculum introduces fields of human knowledge and lays a foundation of appreciation and respect for the interdependence of all things, living and non-living. Geography topics start with demonstrations of the differences between land, water and air. Then a variety of land/water forms and simplified globes are used to show the areas of water and land, as well as to introduce the continents on Earth. Puzzle maps for each continent and some countries are used extensively by the children. Further activities introduce flags, artifacts, animals, and pictures from different parts of the world, as well as the solar system. Nature study focuses on local plants, wildlife and pets, as well as gardening. Sets of cards are used to highlight similarities and differences across species and to learn the vocabulary for the external parts of animals and plants. Physical science is experienced throughout the day as children handle a wide variety of materials: wood, metal, glass, water, clay, sand. The geography materials of land, water and air can be revisited as solid, liquid and gas, and specific exercises may introduce concepts such as “sink or float” and magnetism.

Art work is encouraged through the presentation of a variety of tools and media, including pencils, crayons, paintbrushes, watercolors, easel painting, and clay or playdough. In some classrooms prints of works by great artists are discussed and compared. Beautiful framed works of art or photographs are hung on the walls.

Music is a daily experience, as children sing and dance together during group times. Recorded classical music often accompanies transition times and the children are told or read stories about the life and work of the composer. A formal introduction to musical scales and auditory awareness is provided by the Bell material in the Sensorial area.

Other
Walking on the Line – Children walk along a line on the floor, usually in the form of an ellipse. This is an exercise of balance and self-control, and may be accompanied by rhythmic music. With increasing skill levels, the children are invited to carry an object such as a flag or a bell as they walk.
Silence Games – Montessori tells many anecdotes about the fascination of young children for “making silence” together. This exercise in self-control is enhanced by the experience of a communal effort, and by the awareness of other sounds in the environment that are usually unnoticed.
Group Time - At some time during the day the whole group will usually come together, often sitting in a circle on the floor. This is an opportunity for announcements by the teacher(s) or by individual children, and for group singing. The amount of whole group time is very limited, in order to maximize the length of the uninterrupted work period.
Outside time – The optimal Montessori environment has an indoor and an outdoor component. Daily time outdoors is highly valued. When Montessori classrooms have direct access to an outside area,

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the doors may be opened during the work period in good weather, allowing children to work outside. Many schools also provide gardening, snow-shoveling, leaf sweeping, and other work for the children. The larger outdoor space also provides opportunities for more exuberant large-motor activity and the use of playground structures or natural landscape formations.

Daily Schedule

An uninterrupted work period is key to ensuring that children have the time to settle into the tasks that interest them, without unnecessary interruptions. The activities of the children demand focus, attention, and concentration, so their activities are referred to as "work" rather than "play." During the work period, children choose their own activities and may accept invitations to brief individual and small-group lessons from the teacher. Large blocks of time are scheduled to protect this work flow, with the goal of reserving a daily minimum work time approaching three hours and no less than two hours. Freedom of choice, movement, and repetition are fostered throughout the child's day, while freedom is balanced with responsibility. Whole group activities are scheduled outside the uninterrupted period, and usually include outdoor play, "specials", group meals, and adult-led group meetings and occasional lessons.

Role of the Teacher

> *The first thing required of a teacher is that he be rightly disposed for his task.*
>
> Montessori, Maria, The Secret of Childhood

The Lead Teacher

Montessori teachers have completed a highly specialized course of training for the age level of the classroom and are viewed as facilitators or guides. The teacher meticulously designs, prepares and maintains the learning environment and introduces children to the uses of the materials with clear and concise demonstration lessons. Most of these brief lessons are presented individually, while the other children in the classroom are working independently, but some lessons may be given to small groups. The teacher stays in the background, observing individuals and the dynamics of the group like an anthropologist. These observations are the basis for a cycle of observation, interpretation, planning, and assessment. The teacher determines which activities to introduce next to each child and the records become a document of the child's progress. The number of lessons each child receives each week varies accordingly.

The Classroom Team

Montessori early childhood teachers sometimes work in a teaching team with one or more additional Montessori-credentialed teachers. The resulting opportunities for collegial discourse and shared responsibilities benefit the children as well as the teachers. Schools may also employ classroom assistants as teacher aides.

All adults in the Montessori early childhood environment move gracefully and speak calmly and unobtrusively, taking care to maintain a neutral, non-judgmental stance in interactions with the children, by avoiding praise or any indication of competitive comparisons. The adult aspires to be an authentic model of grace and courtesy at all times, warmly welcoming the children and visitors into the environment, and establishing and maintaining ground-rules for behavior.

Classroom Assistants

Most schools employ classroom assistants who provide support to both teacher and children. The assistant is often trained on the job, though some assistants may have attended training courses or workshops. Sometimes, this position is filled by an intern who is enrolled in a Montessori teacher

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education program.

Adult/Child Ratio
State licensing requirements determine minimum adult/child ratios, and these are fully adequate for the needs of a Montessori classroom. In fact, it is desired that Montessori classrooms have a higher adult/child ratio, as this fosters independent learning, and encourages children to learn from their multi-aged peers.

Progress Reports and Outcomes
Observation and note-taking of the child's activities and behaviors are a part of the teacher's daily work. The teacher maintains a comprehensive checklist to track each child's lessons and follow-up activities, and keeps work samples and notes on behaviors and interactions. These records document the progress and behaviors of each child in every area of the curriculum and supply a useful data source in regards to the child's development. In addition, public schools and some private schools implement standardized testing according to local expectations or requirements.

Role of the Family

The family holds the central place in a young child's life, and ongoing communication between teachers and parents is of great importance for the child's welfare. Teacher/parent relationships in a Montessori school are strong, because the child stays in the same classroom for three years. Parents can expect to be invited to meet with the teacher before their child enters the class, and to be invited to make appointments to observe the classroom in action. Regular parent/teacher conferences provide opportunities for dialogue, assisting both parents and teachers in their understanding of the child's interests, activities and skills. In addition, parents are encouraged to attend school presentations on child-rearing topics, which often include discussions about ways the Montessori approach may be implemented in the home. The school community includes the children, their families, their teachers, the school administrators and all personnel at the site.

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Characteristics of a Montessori Elementary Program

Montessori education embraces the pedagogical principles and practices developed by Dr. Maria Montessori based on her extensive observations of children and her deep insights into the goals of education. This unique approach to education respects the individuality of each child within the classroom community, while fostering personal, intellectual, and social growth through a comprehensive range of age-appropriate developmental activities. The program for children aged six to twelve builds on the foundations of the Montessori early childhood program, and responds to their growing interest in the world beyond the classroom.

Developmental Characteristics of Children ages 6 through 12 years

> *Imagination is the great power of this age.*
>
> Montessori, Maria, From Childhood to Adolescence

In comparison with the dramatic developmental changes in the preschool years and during adolescence, the elementary years represent a stable period of even growth. At this age, children are strong and well-coordinated, and enjoy physically active games. They have a great thirst for knowledge and can imagine things outside their immediate personal experience. Their new interest in the outside world is characterized by a passion for collecting, and by some big questions. They are interested not only in the highest, oldest, heaviest or longest things, but also in how and why everything came to be, what is good and bad, what is fair and just, and what will be their own role in life. The children openly and freely share their thoughts and enthusiasms, have a sense of humor, and take great pride in their accomplishments. This is the age of hero worship and the desire for close friendships, with efforts to negotiate, to debate and compromise in order to belong within the social circle of their peers. At the same time, they continue to admire their parents and do not question family values.

Philosophical Background

Montessori emphasized that the goal of education is two-fold, to support the full development of individual potential, and to also support each individual in becoming a contributing member in a peaceful society. An education for life addresses physical, social-emotional and character development, as well as academic knowledge and career readiness. Montessori programs are planned to be responsive to the developmental stage of the children, and value self-confident, independent thought and action, as well as warm cooperation and respectful collaboration with others.

The Elementary Level Program stimulates the child's imagination and curiosity. Exciting stories about the origins of the world, the evolution of life and the history of human endeavor establish a frame of reference for further study in all subject areas. These stories of interconnected relationships and ecological interdependence, along with origin stories and inspirational biographies convey the message that every individual has an important role to play in the world, and inform classroom debates about morality and justice as children take increasing responsibility for their own actions within the community of learners. The Elementary program constitutes a cosmic education.

Age-Groupings

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Multi-age groupings are essential for a Montessori program, creating a sense of family, making competitive attitudes irrelevant, and guaranteeing the individualization of the curriculum for each child. Elementary I classrooms serve children ages 6 to 9 and Elementary II classrooms serve the age range 9 to 12, while some elementary classes group the full age range from 6 to 12. Optimally, one third of the group changes each year as the oldest children move on and a new group enters. When children stay in the same environment for a three-year cycle, the bonds and understanding between child and teacher are significantly strengthened and the children's sense of security gives them confidence and supports the development of leadership skills, as they take part in organizing community meetings and events, and make group decisions regarding classroom expectations and rules. The older children are role models and mentors for the younger ones.

The Classroom Environment

The classroom environment is the work center and home base for the explorations of the children. A large carpeted open area allows for spreading out large-scale materials on the floor, as well as for whole group meetings. Furnishings in the surrounding space include large and small tables and varied seating options, from desk chairs to sofas. Classic Montessori materials and supplemental resources are displayed for visibility and easy access on open shelving and specialized storage racks, carefully organized by content area and sequence of lessons. Curriculum implementation also requires access to facilities for food preparation, lab experiments and workshop activities, as well as storage for cleaning equipment, personal possessions and work in progress. Indoor plants and small animal habitats and an "outside classroom" provide resources for exploring plant and animal life and cultivating gardens. The environment is attractive, orderly, clean and well-maintained, a demonstration of respect for the people who use it.

Curriculum

> *To do well, it is necessary to aim at giving an idea of all the sciences, not in precise detail but only as an impression. The idea is to "sow the seeds of the sciences" at this age, when a sort of sensitive period for the imagination exists.*
>
> Montessori, Maria, From Childhood to Adolescence

Great stories told by the teacher about the origins of the world, the evolution of life, and the history of human endeavor are the springboard for the entire elementary curriculum. This is a spiral-sequential curriculum as children hear the stories repeated each year and build on the knowledge they have internalized, delving deeper into the details, and seeing the connections more clearly. The wonder, appreciation and respect for nature and humanity that is inspired by the stories also contributes to the growth of personality and moral character that is intrinsic to the goals of the program. In all areas, the children progress through the three-year curriculum at their own pace with teacher guidance, support and oversight.

<u>Cultural Knowledge</u>
Five great stories are presented annually early in the Elementary I classroom:
- The Origins of the Earth (Physics, Chemistry, Geology, Geography)
- The Coming of Life (Evolution and Biology)
- The Coming of Human Beings (Human Evolution. History. Fundamental Needs of Peoples, Creativity)
- The Invention of Writing (Communication)
- The Invention of Numbers (Mathematics)

The stories are illustrated by charts, scaled timelines, and science demonstrations and artifacts, which are explored by the children throughout the year. The content of the subject areas that are introduced with the stories is further developed in lesson sequences using specific materials, and

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children have opportunities to select the topics they wish to investigate in greater depth. This follow-up work requires extensive reading and writing, culminating in reports that are presented to the whole class. At the Elementary II level, the focus shifts to the activities and accomplishments of people around the world, with studies of early civilizations, explorations, migrations, economics, and more advanced science.

Practical Life

Competence in daily life and work involves social awareness and a variety of skills and habits that are modeled and practiced in the elementary classroom on a daily basis. Lessons and activities address health, safety and hygiene, grace and courtesy, cleaning and maintenance of the environment, food preparation, uses of technology and media, and nurture of plants and animals. Organization and good study habits are developed with clear expectations and tools such as work plans, daily agendas and calendar deadlines. Ground-rules ensure that the needs of individuals and the group are respected, and the children participate in delineating and enforcing the rules. Regular class meetings provide a forum for discussion, respectful expression of concerns and attempts at resolution.

Going Out

Exploration of the world beyond home and school is an essential element of the elementary program. Valuable real-world experiences foster independence, self-reliance and cooperation, encompassing activities and observations in natural environments such as nature hikes, orienteering and camping, and activities in the community, such as volunteering, visiting museums and factories, and interacting with adults in their workplaces. These experiences are directly linked to curriculum content, and whenever possible, the children take a role in organizing the outside visits.

Literacy

Most children enter the elementary classroom at the age of six years with basic writing and reading skills. The Montessori Elementary teacher is prepared to support each child's level of readiness by starting with lessons at the skill level of the individual. With increasing competence, children will read and write extensively throughout the day, as they immerse themselves in curriculum studies and prepare oral and written presentations of their work. Specific language lessons and exercises strengthen vocabulary and spelling, clarify grammar and syntax, and practice comprehension and expression. A school library offers carefully selected fiction and non-fiction, to engage children in reading for both pleasure and information, while participation in regular group discussions develops the capacity to analyze, critique and express personal opinions and perspectives.

Math

Mathematical concepts are introduced one step at a time, using manipulative materials to promote a solid grasp of number relationships and operations before introducing written notation. At the elementary level, arithmetical operations are conducted with large numbers – up to one million - using materials that are increasingly abstract. The curriculum includes memorization of basic number facts, fractions, decimals, multiples, factors and divisibility, squares and square roots, binomials, trinomials, decanomials, prime numbers and negative numbers. Additional topics introduce ratios and percentages, algebraic equations, measurement, probability and estimation, statistics and graphs.

Geometry

Beginning with visual recognition of plane figures and solids, this curriculum explores the concepts of point, line and plane, the properties of triangles and quadrilaterals, congruent, equivalent and similar figures, perimeter, area, volume, and the theorem of Pythagoras.

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Art, Crafts, Music
A variety of tools, media and techniques are demonstrated and used by the children for self-expression, for illustration of curriculum projects, and for construction and experimentation. Appreciation for art and music is encouraged by group discussions of prints of famous paintings and music recordings, while involvement in music is also supported with the tone bar material and opportunities for singing, playing instruments and lessons in notation.

Daily Schedule

An uninterrupted work period is key to ensuring that children have the time to settle into their tasks without being interrupted unnecessarily. The varied activities of the children demand focus, attention and concentration, so a daily time block of two to three hours is scheduled to protect the work flow. During this time the teacher observes, consults, and gives individual and small group lessons. The children work individually or collaboratively at their own pace. Classroom ground rules set specific limits, while encouraging autonomy. Freedom of choice, movement, and repetition are fostered throughout the child's day, while freedom is balanced with responsibility. Whole group activities such as class meetings, 'specials" and meals are scheduled outside the uninterrupted work period.

Role of the Teacher

The Lead Teacher
Montessori teachers have completed a highly specialized course of training for the age level of the classroom and are viewed as guides and facilitators of learning. The teacher designs and prepares the learning environment, entices interest in curriculum topics and gives clear lessons on the uses of the materials. Most lessons are presented to small groups while the other children in the classroom are working independently. Each child makes work choices based on an individualized weekly or monthly work plan that has been created in consultation with the teacher. The older children have significant responsibility for managing their workload and are held to expectations for timely completion.

The curriculum in each area is precisely sequenced, and the teacher keeps observation records of the interests and skill level of each child, which are regularly referenced to decide when to introduce the next activity. The number of lessons each child receives each week and the sub-groupings for lessons vary accordingly. The teacher supervises the class with a gentle, consistent demeanor, presenting a model of peace and kindness, grace and courtesy, respect and caring, while taking care to maintain a neutral, non-judgmental stance in interactions with the children, by avoiding any indication of competitive comparisons.

The Classroom Team
Montessori elementary teachers sometimes work in a teaching team with one or more additional Montessori-credentialed teachers. The resulting opportunities for collegial discourse and shared responsibilities benefit the children as well as the teachers. Schools may also employ classroom assistants as teacher aides.

Classroom Assistants
Most schools employ classroom assistants who provide support to both teacher and children. The assistant is often trained on the job, though some assistants may have attended training courses or workshops. Sometimes, this position is filled by an intern who is enrolled in a Montessori teacher education program.

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Adult/Child Ratio

State licensing requirements determine minimum adult/child ratios, and these are fully adequate for the needs of a Montessori classroom. In fact, it is desired that Montessori classrooms have a higher adult/child ratio, as this fosters independent learning, and encourages children to learn from their multi-aged peers.

Progress Reports and Outcomes

Observation and note-taking of the child's activities and behavior are a part of the teacher's daily work. The teacher maintains a comprehensive checklist to track each child's lessons and follow-up activities, and keeps work samples and notes on behaviors and interactions. These records document the progress and behaviors of each child in every area of the curriculum, and provide the basis for planning, instruction, and assessment. These records also supply a useful data source in regards to the child's development. In addition, public schools and some private schools implement standardized testing according to local expectations or requirements.

Role of the Family

Parents and family members have an integral role in the education of every child, and ongoing communication between teachers and parents is of great importance for the child's welfare. Teacher/parent relationships in a Montessori school are strong because the child stays in the same classroom for three consecutive years, which affords ample time to develop partnerships of mutual trust. Parents can expect to be invited to meet with the teacher before their child enters the class, and to be invited to observe the classroom in action. Regular parent/teacher conferences provide opportunities for dialogue, assisting both parents and teachers in their understanding of the child's interests, activities and skills. In addition, parents are encouraged to attend school presentations on child-rearing topics, which often include discussions about ways the Montessori approach may be implemented in the home. Parents may support teachers by sharing their expertise in areas of study, by volunteering as chaperones on outings, and by providing assistance with special events. The visible presence of parents at school events also contributes to communicating their belief in the value of education to their children.

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Characteristics of an AMS Montessori Secondary Program

A Montessori Secondary Program for middle and/or high school students is inspired by Maria Montessori's writings and philosophy. While Dr. Montessori clearly articulated a curriculum for Montessori Early Childhood and Elementary age groups, she left only general guidelines for Montessori Secondary programs, writing of the need for secondary school reform that addressed the unique developmental characteristics of 12- to 18-year-olds.

Dr. Montessori's theories, which are today supported by modern scientific research, provide direction for establishing a prepared learning environment for adolescents. These environments integrate vigorous student-centered academic studies with purposeful work, preparing adolescents to become contributing adult-citizens who are self-confident and who possess skills needed to thrive in society.

Developmental Characteristics of the Adolescent (12 - 18 years of age)

> *We must truly consider this mysterious and wonderful creature which the adolescent is because adolescence, one can say, is not only a period of growth, but rather a great transformation – if you like, a creation.*
>
> Montessori; 34th Lecture, 1938

A Montessori Secondary program is designed to address the needs of students entering a new plane of development characterized by construction of the social self, issues of self-concern and self-assessment, critical thinking, and the continued construction of social and moral values.

During this period, the adolescent demonstrates the following characteristics:

- Adolescents experience a period of tremendous physical growth, the onset of puberty (sexual maturation), and boundless energy.
- Typically, adolescents experience self-awareness and self-criticism, emotional ups and downs, uncertainty, vulnerability (self-doubt and hesitation), argumentativeness, and ego-centrism.
- Socially, they seek solidarity with peers. However, they can be critical of those peers and of adults. Concurrently, they crave greater independence. They are concerned with human welfare and dignity, and are often morally and ethically minded.
- Adolescents exhibit novelty-seeking and risk-taking behaviors and seek intensity and excitement as a result of their under-developed pre-frontal lobe (which controls impulses and emotions). They exhibit an increased desire for autonomy, an increased interest in "group-think", and susceptibility to peer pressure. Adolescents benefit from positive bonds with non-parental adults they can trust.
- Cognitively, adolescents are critical thinkers who question why, are creative and have a greater ability to reason, and are capable of mature thought if framed in a personal context.

Key Features of a Montessori Secondary Program

> *But above all it is the education of adolescents that is important, because adolescence is the time when the child enters on the state of manhood and becomes a member of society.*
>
> Montessori, 1948. P. 60

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Dr. Montessori did not intend for a Montessori Secondary program to stand-alone. Ideally, Secondary programs grow from Montessori Elementary programs, so that the majority of Secondary students have previous Montessori experience over a 3-year cycle. If there are openings, students without a Montessori background may be considered, but it is recommended that they make up no more than 25% of the student body of the school.

The classroom environment is characterized by a student-centered, constructivist approach that enables adolescents to manage time, exercise choice, organize themselves, and practice self-regulation and reflection within a group context. The adolescent community is a mini-society of adolescents and teachers in which relationships are nurtured. The environment has the necessary **materials and supplies** for academic courses and Erdkinder work.

Age Groupings

In Secondary I (ages 12-15) programs, the ideal community classroom will have two adults working together to integrate curriculum content. For example, there are two core academic teachers, or one academic teacher and a specialist or assistant.
In Secondary II (ages 15-18) programs, the ideal community will have core subject-specific teachers working together to integrate the curriculum content.
The adult-to-adolescent ratios at Secondary I and Secondary II should optimize a sense of community and ensure that teaching staff are able to develop strong personal relationships with their students.
The classroom structure also allows for **multi-age groupings** in core curricular classes. Secondary students may be grouped in 2- or 3-year age groupings as follows: ages 12-14, 14–16, 16–18 (grades 7–8, 9–10, 11–12) **or** ages 12-15, 15–18 (grades 7–9, 10–12).

Daily Schedule

The schedule allows for uninterrupted work periods for core curricular subjects (math, science, social studies, language arts, additional world languages, and other core subjects). Uninterrupted work periods (a minimum of 90 minutes for each core academic subject) honor student choice, foster concentration, and support student engagement in work.
Adolescent communities allow opportunities for collaborative work and student leadership as exhibited by:

- Daily student-led community meetings
- A community of learners engaged in collaborative work
- Activities such as structured dialogue and discourse among students, inquiry-based problem solving, and applied scientific method that encourage diversity of perspectives, thoughts, and learning styles
- A culture that fosters compassionate and respectful interactions
- A just society for all, demonstrated through grace and courtesy

Montessori Adolescent programs promote responsible and ethical **use of technology**, with the majority of the school day spent in learning activities and practices that require peer-to-peer and student-teacher interaction.

Curriculum

> *Study should not be restricted by the curricula of existing secondary schools…the aim should be to widen education instead of restricting it.*
>
> Montessori, Maria. 1948. P. 71

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Although Dr. Montessori did not create a curriculum for the third plane of development, she did offer a general outline of study. A Montessori Secondary curriculum:

- Meets the developmental needs of the adolescent
- Builds upon the Montessori Early Childhood & Elementary curricula
- Follows the three-period learning design
- Exhibits a transdisciplinary approach to learning
- Includes student-led community meetings and opportunities for collaborative work
- Is student-centered and constructivist as evidenced by students managing time, having choice, organizing, and participating in whole-group decision-making
- Cultivates awe and wonder
- Incorporates time for reflection, silence, and solitude into the daily schedule
- Offers field studies and out-of-classroom excursions designed to cultivate global citizenship
- Requires field experiences in nature that may include land labs, camping, internships, service learning, and outdoor education trips
- Provides experiences that promote a genuine understanding of economics that may include developing and running a business or selling produce at a farmer's market
- Fosters a culture that engenders a sense of hope in the progress and potential of the human spirit

Dr. Montessori emphasized that Montessori Adolescent programs should be rooted in work of the hands and heart, as well as work of the head. Especially for 12- to 14-year-olds, a Montessori curriculum is rooted in "Erdkinder", the German word for "Earth Children". As important as intellectual work is at this level, the inclusion of activities in nature (e.g. farming, gardening, physical work) that are directly tied to the adolescent's heart and hands is emphasized. A minimum of ten days of overnight field study per year, which may be delivered in two 5-day intersessions, is recommended.

A spiral curriculum is implemented to expose students to many interrelated topics, repeatedly over time. The Montessori Secondary program expands upon learning fostered in Elementary programs and includes core curricular courses of language arts, mathematics, sciences, and social studies that are cognitively challenging in scope. In addition, students take specialized courses including world language courses, visual and performing arts, health, and fitness, among others and participate in field studies linked to themes, academic work, and service learning. Practical Life at the Secondary level includes student use of checklists, work plans, planning calendars, and/or study guides that promote executive functioning skills such as time management, organization, and decision-making.

Montessori Secondary students engage in independent, interest-based research projects that integrate core curricular areas and electives. The scope of these projects matches the developmental level of the students, beginning in Secondary I and culminating in a High School Senior Thesis project and presentation.

The Montessori Secondary curriculum emphasizes the nobility of work—that is, meaningful work done with humility and purpose. The curriculum allows for differentiation and choice, supports engagement and focus on all work tasks, and promotes mastery learning. Lessons and activities encourage active engagement, questioning and dialogue. Students use self-evaluations and rubrics to reflect on and self-assess their learning.

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Role of the Teacher

> *(Teachers) should have the proper qualification for teaching in secondary schools, but this does not mean that they should be free to use their own methods, for they must agree to adopt special methods … these teachers should be open-minded, ready to take part in a new experiment.*
>
> Montessori, 1948. P. 80

Montessori Secondary teachers are viewed as facilitators and student-centered guides, compared with "traditional" teachers who provide direct instruction. As such, they are required to complete a highly specialized course of training and earn an AMS Secondary credential. Procedures and practices for fully implementing a Montessori Secondary program are specifically taught to adult learners in teacher education programs. These practices are developed during and after the completion of training, so that each Secondary program is individual and unique based upon the program location, the school culture, and the needs of the adolescents.

The Montessori Secondary teacher fosters teacher/student/peer interactions that exhibit respect, and grace and courtesy. The Montessori Secondary teacher will:

- Complete a highly specialized AMS Secondary course that focuses on appropriate processes for teaching and learning in the third plane of development and earn an AMS Secondary credential
- Apply current research in the field of adolescence that aligns with Montessori processes and content
- Serve as an inspiring role model
- Practice personal and professional reflection, self-care, and renewal activities on a regular basis
- Recognize and encourage the development of positive qualities in the adolescent by maintaining a vision of what students can become, and by providing support and encouragement for each student to achieve his or her full potential
- Observe and respond to adolescent needs for leadership, movement, creativity, problem-solving, responsibility, independence, and autonomy
- Demonstrate mastery of curriculum content by providing whole group lessons, mini lessons, and individual coaching to students
- Create work that helps students synthesize learning
- Foster and support cooperation and collaboration within the adolescent community
- Assist the adolescent in finding her/his place in society

Role of the Family

> *During the difficult time of adolescence, it is helpful to leave the accustomed environment of the family in the town and go to quiet surroundings in the country, close to nature.*
>
> Montessori 1948. P.80

At the third plane of development, the role of the adults in the family changes from what it was during the earlier years. Their role is to:

- Learn about the unique characteristics of adolescents and the Montessori Secondary program
- Advocate for the healthy development of their adolescent's unique identity and belief system
- Set and maintain firm but reasonable limits and enforce those limits consistently
- Encourage the appropriate development of their adolescent's independence

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- Recognize and honor the importance of the adolescent community

Dr. Montessori recognized the important role of families at all developmental levels. She understood that young people entering adolescence were no longer children and not yet adults. One goal of the Montessori Secondary program is to help the family adapt to the transitional dynamics of adolescence. For example, in order for the student to experience real-life decision making, family members are discouraged from supervising field studies. On the other hand, it is imperative that the family attends student-led conferences that celebrate the student's growth.

Essentials of a Montessori Secondary Program

The seven essentials listed below are provided to communicate clearly the core essentials for a Montessori Secondary program. It takes time to implement all the features and aspects of a Montessori Secondary program described above. In an effort to assist programs that would benefit from a clear list of core requirements, the seven essentials for a Montessori Secondary program are listed below:

1. Honors the social needs of adolescents by serving a minimum or 8 students.
2. Has multi-age groupings in core curricular classes. Secondary students may be grouped in 2- or 3-year age groupings as follows: ages 12-14, 14–16, 16–18 (grades 7–8, 9–10, 11–12) or ages 12-15, 15–18 (grades 7–9, 10–12).
3. Is student-centered and constructivist as evidenced by students managing time, having choice, organizing, and participating in whole-group decision-making
4. Has student-led community meetings and opportunities for collaborative work.
5. Has a schedule that minimizes disruptions in physical and mental work flow and that maximizes time for student engagement in their work. The schedule includes work periods that are 90 minutes or more in length. A common model of weekly scheduling is that of four days per week for each core subject. The fifth day is typically reserved for going outs, specials, etc.
6. If curricular subjects are separated, the schedule allows for 90 minute (or more) class periods for each core subject.
7. Has the necessary materials and supplies for implementing academic courses and Erdkinder work.
8. Has core teaching faculty who hold (or are in the process of earning) an AMS Montessori Secondary credential

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Zero to Three. *www.zerotothree.org*

AMS Resources

AMS Montessori Uninterrupted Work Period: See www.amshq.org > School Materials

AMS School Accreditation Standards and Criteria: See www.amshq.org > AMS School Accreditation

AMS Suggested Materials Lists: See www.amshq.org > School Resources > Classroom Materials

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