

INSTRUCTIONAL LEADERSHIP PRACTICES OF MONTESSORI
PUBLIC SCHOOL PRINCIPALS: THE MONTESSORI
TEACHERS' PERSPECTIVES

by

GINGER KELLEY MCKENZIE, B.A., M.A.

A DISSERTATION

IN

EDUCATIONAL LEADERSHIP

Submitted to the Graduate Faculty
of Texas Tech University in
Partial Fulfillment of
the Requirements for
the Degree of

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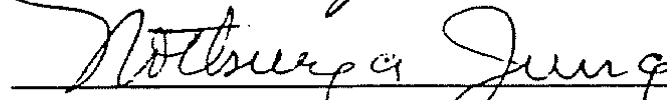
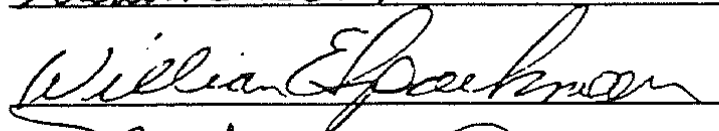
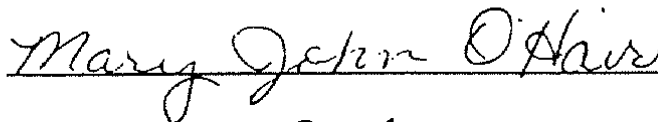
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Approved



Chairperson of the Committee



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TABLE OF CONTENTS

ACKNOWLEDGEMENTS	ii
ABSTRACT	ix
LIST OF TABLES	xiii
CHAPTER	
I. STATEMENT OF THE PURPOSE AND PROCEDURES.	1
The Purpose of the Study	4
Background of the Study	5
Montessori Method of Education	5
Changes Needed In Preparation Programs for School Administrators	10
Expressed Concerns About Montessori Administrators As Instructional Leaders	11
Instructional Leadership Important for Montessori Principals	14
The Research Problem	18
Questions	18
Definitions of Terms	18
Qualitative Research	18
Focus Group Interview	20
Instructional Leadership	20
Montessori Public Schools	21
Principal	24

Limitations	24
Delimitations	24
The Research Design	25
Entry and Access	26
Participants	28
Methods of Data Collection	29
Significance of the Study	34
Organization of the Research Report	35
Summary	36
II. ANALYTICAL REVIEW OF LITERATURE	38
Historical and Philosophical Aspects of Montessori Education	38
Montessori Research	41
Preparation Programs for School Administrators	44
Problems With and Proposed Preparation Programs for Educational Administrators	45
Montessori Training Programs for Educational Administrators in Public Schools	56

Instructional Leadership Factors and Studies	59
Instructional Leadership Defined in Literature	59
Research Reported on Instructional Leadership	67
Leadership Theories	76
Managerial Grid	77
Theory X and Theory Y	81
Transactional and Transformational	84
Contrasting Leadership Theories	90
Open Issues on Instructional Leadership	93
Summary	95
III. RESEARCH METHODS: DESIGN, DATA COLLECTION, AND ANALYSIS	97
Qualitative Research Design	97
Pilot Study	98
Overview of the Research Design	102
Participant and Site Selection	104
Data Collection	105
Data Analysis and Interpretation	116
Validity and Reliability in Qualitative Research.	124
External and Internal Validity In Qualitative Research	124

	External and Internal Reliability In Qualitative Research	127
	Summary	134
IV.	FINDINGS	139
	Natural Settings: Examples of the Focus Group and Individual Interview	142
	Focus Group Interview Vignettes	142
	Individual Interview Vignettes	143
	James MacGregor Burns: Transactional and Transformational Leadership Theories	145
	Transactional Leadership	146
	Transformational Leadership	147
	Montessori Elementary School Data Findings- Questionnaires, Focus Group, and Individual Interviews	151
	Communication Techniques	153
	Shared Responsibilities	165
	Preserving and Supporting the Montessori Programs	177
	School Procedures	193
	Summary	202
V.	FINDINGS, CONCLUSIONS, IMPLICATIONS AND FUTURE RESEARCH	207
	Introduction	207

Literature Review	211
Research Methods	216
Findings and Interpretation of the Data	221
Instructional Leadership Research Compared to Findings	226
Research Implications	232
Future Research	234
BIBLIOGRAPHY	237
APPENDICES	
A. INVENTORY OF INSTRUCTIONAL LEADERSHIP PRACTICES OF MONTESSORI PRINCIPALS	257
B. LETTERS TO TEACHERS ABOUT THE PROJECT	261
C. TEACHER'S PERMISSION FORM FOR QUESTIONNAIRE	264
D. QUESTIONS FOR FOCUS GROUP CMES	266
E. QUESTIONS FOR FOCUS GROUPS A AND B NMES	271
F. QUESTIONS FOR FOCUS GROUPS A AND B SMES	277
G. QUESTIONS FOR INDIVIDUAL INTERVIEW CMES	286

H. QUESTIONS FOR INDIVIDUAL INTERVIEWS NMES	290
I. QUESTIONS FOR INDIVIDUAL INTERVIEWS SMES	298
J. NMES REVIEW OF QUESTIONNAIRE TO DEVELOP FOCUS GROUP AND INDIVIDUAL INTERVIEWS	307
K. SMES REVIEW OF QUESTIONNAIRE TO DEVELOP FOCUS GROUP AND INDIVIDUAL INTERVIEWS	308

ABSTRACT

The purpose of this study was to describe instructional leadership practices of Montessori public school principals as reported by Montessori public school teachers.

The research study employed three methods of collecting data from the teachers in three urban Montessori public schools in a midwestern metropolitan city: (1) open-ended questionnaire entitled: Inventory of Instructional Leadership Practices of Montessori Principals (IILPMP), (2) semistructured focus group interviews, and (3) semistructured individual interviews. The use of three different kinds of data sources is one form of triangulation.

The study participants included fifty-four teachers from three public Montessori elementary schools who answered the IILPMP questionnaire, five focus groups involving thirty teachers, and seven teachers individually interviewed.

Constant comparative analysis was used for data

analysis. It is a research design for multidata sources, in which the formal analysis begins early in the study and is nearly completed by the end of the data collection.

The questionnaires, focus groups, and individual interviews were reviewed through a line-by-line inspection of the teachers' responses. Specific quotes were taken from these data sources and recorded under emergent categories and subcategories. Under the category "communication techniques" the subcategories are: (1) communicating openly, calmly, clearly, and fairly with a varied school community, (2) building consensus through communication, and (3) practicing public relations through communication. Under the category of "sharing responsibilities" the subcategories are: (1) sharing responsibilities with teachers through teacher committees, through sharing visitor observations between classrooms, and through approving student leadership camps planned by the teachers, and (2) sharing responsibilities with parents. Under the category of "preserving and supporting the Montessori program" the following subcategories emerged: (1)

understanding the dynamics of the Montessori program, (2) blending the Montessori curriculum with the public school curriculum, (3) having what is needed for the Montessori programs and mobilizing help to get these things, (4) supporting the Montessori report card committee, (5) preserving the Montessori program by educating parents, (6) assisting and supporting Montessori students, and (7) modeling the Montessori philosophy. Under the category of "school procedures" the subcategories are: (1) providing support services for students, and (2) providing student directed discipline and clear school discipline procedures.

The findings were interpreted by drawing on the theories of transactional and transformational leadership. Transactional leadership occurred when the Montessori principals and teachers exchanged something of value in order to accomplish independent objectives. When the Montessori principals and teachers exchanged something that raised each of them to higher levels of motivation and morality, transformational leadership occurred.

This area of study is still very new and offers a rich opportunity for future research. For example, additional research is needed in the role of staff development in Montessori schools because the Montessori teachers described a limited number of instances of staff development as practiced by their principals as instructional leaders.

LIST OF TABLES

1. Exhibiting Progression from NMES Questionnaire Responses to the Emergent Topics 118
2. Exhibiting Progression from NMES Focus Group and individual Interview Responses to Emergent Topics ..121

CHAPTER I

STATEMENT OF THE PURPOSE AND PROCEDURES

In recent years, research on the work of principals has increased sharply (Blase, 1987A). Much of this research has focused on principals as instructional leaders (Prickett, Richardson, Short, & Lane, 1990). As instructional leaders, principals should instill a vision of excellence and ownership in their schools (White-Hood, 1991), they should help teachers focus on new classroom instructional techniques (Fraser & Melton, 1992), they should practice professional growth and reflection (Lee, 1991), and they should provide continuous staff development (Sparks, 1992A). Wright (1991) explains that since the most important activities in school are teaching and learning, the principal should spend the majority of his/her time as instructional leader. This is especially critical for principals of Montessori schools. Otis (1992) notes that it takes a great deal of skill to make the state mandates and the



Montessori pedagogy work together. She said that Montessori principals need a thorough comprehension of the Montessori curriculum plus administrative training. For the Montessori method of education (described later in this chapter) to realize its maximum potential it must conform to the Montessori philosophy. Montessori public school principals, then, should have the strongest knowledge base possible about the Montessori philosophy and how to implement and support the philosophy as they practice instructional leadership. Jill Otis, who in 1992 was finishing her tenth year as a public Montessori school principal in New Orleans, says, "The (Montessori) philosophy gives us our essence, and the (Montessori) principal must work to ensure the school's adherence to its philosophy" (Otis, 1992, p. 11).

Teachers are the direct recipients of the principal's instructional leadership efforts to adhere to state mandates while at the same time providing insight into the Montessori philosophy. The teachers' perceptions provide one valuable source of data about this demanding role.

Rosen (1992), a former public Montessori principal in Buffalo, New York, asserts that if there were new creative and research based methods of providing preparation for Montessori principals they might help resolve some of the challenges and changes going on in Montessori schools. These challenges include instilling ownership, strengthening classroom instruction, and providing the strongest Montessori program possible for all the children. This study can be used to develop a course of study or a series of articles to help prepare Montessori principals to meet the challenges facing them in their Montessori schools. Furthermore, it is useful for practitioners to utilize for their individual purposes.

Blase (1987A) states that while there is a developing knowledge base regarding school leadership, little attention has been given to the relationship between leadership and school context variables. Although some studies provide detailed qualitative descriptions of school context, few studies describe the principals' actions specifically from the teachers' perspective. This study does include the Montessori teachers'

perspectives of their principals practicing instructional leadership.

Because teachers are the recipients of principals' instructional leadership practices, the Montessori teachers in this study were asked to describe how their Montessori principals practiced instructional leadership. The study's findings, because of its research foundation, adds to the knowledge base of Montessori administration and, in particular, how Montessori principals can better practice instructional leadership in their Montessori schools.

The Purpose of the Study

This study describes the instructional leadership practices of Montessori public school principals from the perspective of Montessori teachers. This will add to the knowledge base of how public school Montessori principals practice instructional leadership (an area of research that has not been investigated). A likely reason that it has not been investigated is that only recently have public schools begun to

adopt the Montessori philosophy in significant numbers. As these numbers grow, and the trend line is sharply up, it is becoming increasingly critical that a knowledge base develops on how Montessori principals in public schools practice instructional leadership that both adheres to scholastic and bureaucratic pressures experienced in public schools while at the same time preserving the Montessori philosophy.

Background of the Study

Montessori Method of Education

The Montessori method of education was developed by Maria Montessori early in the 1900s in Italy. She considered her classroom observation and experience with the children her "true degree in pedagogy" (Deighton, 1971). The central aspect of Montessori education is the development of the reasoning mind to be the precondition of independence. In Montessori education, the preschool child enjoys a prepared environment of multi-sensory materials. Montessori education for ages six to twelve is a period of the acquisition of culture, just as the

former was the absorption of the environment (Montessori, 1973). Elementary children need to work with other children and be encouraged to make choices. "Our teaching must only answer the mental needs of the child, never dictate them" (Montessori, 1973, p. 7).

The Montessori method of education is increasingly being adopted by more public and private schools. The title of an article in Education Week (Cohen, 1989) is illustrative: "Public Schools Embrace Montessori Movement." There are now about 164 public schools in 92 districts offering thousands of pupils this educational model (Schapiro, 1994). In the fall of 1989, Cairo, Illinois became the first public school system in the United States to make Montessori education the only option for preschool through first grade (Schapiro, 1989). It is further estimated that as many as 4,000 schools bearing the Montessori name are now operating in the private educational sector of the United States.

Several factors have contributed to the expansion of Montessori education into an increasing number of public and

private schools. These factors include.

(1) The proven success of Montessori education in public and private education. Between 1913 and 1984 there were thirty-two available studies comparing children in Montessori and non-Montessori programs. Eighty-eight percent of these studies showed that Montessori children performed statistically significantly higher on academic achievement tests than non-Montessori children, and eleven percent showed Montessori children did as well as children who were not in a Montessori environment (Boehnlein, 1987).

(2) In practice, the Montessori method respects and supports the student's individual development in an ungraded classroom in which a diverse group of children work together. There is evidence which shows that mixing age groups and abilities within classrooms has a positive effect on student motivation and learning (Cuban, 1989). To help build self-esteem within the children and help reverse the increasing dropout rate, education must meet the diverse needs of all our children. High standards and demanding pedagogy are precisely

what students need (Glenn, 1989). The Montessori curriculum and humanistic classroom procedures offer this to children in Montessori schools.

(3) Extensive Montessori certification training is available and required for all Montessori teachers. A number of associations offer Montessori teacher certification courses in the United States and in other parts of the world. Those seeking accreditation by the Montessori Accreditation Council for Teacher Education (M.A.C.T.E.) are: The American Montessori Society (A.M.S.), Association Montessori Internationale (A.M.I.), International Association of Progressive Montessorians (I.A.P.M.), London Montessori Centre (L.M.C.), Montessori St. Nicholas Centre (S.N.), the National Center for Montessori Education (N.C.M.E.), Pan American Montessori Society (P.A.M.S.), St. Nicholas Montessori College Ireland (S.N.I.), California Consortium of Independent Courses, Independent Montessori Consortium #1 (I.M.C.#1), Independent Montessori Consortium #2 (I.M.C.#2), Independent Montessori Consortium #3 (I.M.C.#3), I.M.I.-U.C. Consortium (I.M.I.-U.C.), and Montessori Institute of

America (M.I.A.). There are several other Montessori teacher training centers, such as the Institute for Advanced Montessori Studies (I.A.M.S.), which have not, by their choice, become part of M.A.C.T.E. The training courses offer one or more of the following areas of Montessori training: Early Childhood I (birth-age 3), Early Childhood II (ages 2-1/2-6), Elementary I or I-II (ages 6-9 or 6-12), and Secondary I or I-II (ages 12-15 or 12-18).

(4) There is a direct relationship between the Montessori preschools and the Montessori elementary programs. Very few non-Montessori preschool programs in the field of early education have lasting effects on the ability levels of elementary children because there is no congruency between the preschool and elementary programs (Cohen, 1990). In contrast, the Montessori curriculum does progress in a very systematic way from the preschool experience to the elementary experience. For example, in the preprimary Montessori classroom the children manipulate the triangles in the constructive triangle boxes to make new shapes like rectangles,

squares, parallelograms, etc. Montessori actually designed these boxes to be used in the elementary classrooms to help children learn concepts of equivalency, congruency, and similarity. Early childhood educators have reported that cognitive gains in preschoolers can be sustained in programs that continue into and complement elementary schooling (Cohen, 1990).

Changes Needed in Preparation Programs for School Administrators

Between 1985 and 1990 new proposals for the education of principals have been issued by the National Commission on Excellence in Educational Administration, the Danforth Foundation, the National Policy Board for Educational Administration, the Southern Regional Consortium of Colleges of Education, and the National Commission for the Principalship (Duke, 1992). These groups agreed unanimously that reforms in principal preparation programs must take place as soon as possible, even if uncertainty exists concerning the emerging role of principals. Teacher empowerment, choice, and school

restructuring are only three of the changes affecting the principal's role (Duke, 1992). Otis (1992), who in 1992 completed ten years as a public Montessori administrator at the Audubon Montessori School of New Orleans, stated that it is time to develop Montessori administrative training programs to prepare Montessori principals for their responsibilities. One of these situations includes the instructional leadership role, which is one of the most important responsibilities of Montessori principals (Rosen, 1992). The Montessori teachers' perspectives in this study should generate insights and ideas for developing the instructional leadership aspects of Montessori administrator preparation programs. The Montessori public school movement has resulted in Montessori administrators needing insight about what Montessori is and how to be an instructional leader in this type of school.

Expressed Concerns About Montessori Administrators as Instructional Leaders

As the Montessori movement has penetrated the public arena several important issues have emerged. For instance,

some feel that bureaucratic constraints and a lack of Montessori trained public school educators will mean that public schools will adopt Montessori in name without fully adhering to the movement's principles (Cohen, 1989).

Montessori schools have special needs beyond the unique requirements of other magnet programs (Schapiro, 1990). The Montessori magnet is not an embellishment of already existing curricula or standard practices as other magnets generally are. Rather, it is a unique school which uses only Montessori methods, curriculum, and philosophy to direct the child's learning experiences. The unique nature of the Montessori school can put the non-Montessori trained principal in a very awkward position in several respects. For example, the Montessori principal may have to defend budget requests which are not fully understood by the principal. Schapiro (1990) asserts that the most common obstacle Montessori staffs face with non-Montessori trained administrators in Montessori schools is the firm public school belief that all programs must be treated similarly.

Berliner (1989) states a concern about Montessori programs from the perspective of organizational theory and political reality. Berliner's arguments focus on the political nature of the public schools and their constant need to serve a variety of constituencies. "Policies and procedures are set by governmental departments of education (federal and state), local school boards, superintendents, principals and teachers. All of these people are public employees" (Berliner, 1989, p. 2) and represent some of the constituencies involved in public schools. Berliner is concerned that the districts might introduce standardized textbooks, standardized tests, large class size, large student-teacher ratios, and teaching to the whole group rather than on an individual basis. All of these would violate Montessori instructional practices. Any institution can use the word Montessori because there is no legal restriction against using it. Since this is true, the public could be misled into thinking a true Montessori alternative was being offered when it was not, due to political and budgetary compromises (Miller, 1989). One of the best defenses against

such compromise is a principal thoroughly knowledgeable about Montessori practices.

Instructional Leadership Important for Montessori Principals

Another important issue in instructional leadership is the working relationship between the principal and staff. Brookover (1982) states that the principal should take on the role of instructional leader in improving the school learning climate. Morgenthau (1990) states that effective school-based management is an outgrowth of the principal's leadership ability. The instructional leadership effectiveness of Montessori principals is critical to the success of Montessori schools. Research can identify effective instructional leadership practices to help Montessori principals become stronger leaders.

There have been no qualitative research studies using Montessori teachers' perspectives for identifying the effective practices of Montessori principals as instructional leaders. A

number of studies have used the teachers' perspectives to identify school leadership in traditional public schools (Blase, 1987A, 1987B, 1989, 1990, 1992; Galney, 1990; March, 1984; Sergiovanni & Corbally, 1984; Smith & Blase, 1988; and Smylie & Brownlee-Conyers, 1990). Blase (1987A) conducted a qualitative study of 75 to 80 high school teachers in a biracial high school in the southeastern United States which focused on the teachers' perspectives of effective school leadership. The study data shows that effective high school principals contributed to the development of associative (cohesive), social (behavioral), and cultural (values, norms) patterns in schools. The nine prominent task-related themes include accessibility, consistency, knowledge/expertise, clear and reasonable expectations, decisiveness, goals/direction, follow-through, ability to manage time, and problem-solving orientation (Blase, 1978A). The proposed research is modeled after the Blase study because he too was interested in the teachers' perspectives on their principals practicing instructional leaders.

Dr. Rae Rosen, a former principal of Bennett Park Montessori Center which is a public Montessori school in Buffalo, N.Y., says, "The instructional leadership role is one of the most important aspects of the principal's work. This is especially critical for a Montessori principal" (Rosen, 1992, p. 8). To become an effective instructional leader Dr. Rosen proposed that the principal articulate a vision of the school and consistently hold out that ideal to the staff, to parents, and to the community. According to Rosen (1992):

Again, this is particularly important for a Montessori principal to do, since a Montessori vision may differ considerably from one developed for a more traditional school program. It is not the expectations that are different for a Montessori principal, but the way in which one chooses to meet them that matters most. (p. 8)

As an example, all schools need equipment, books and materials, but Montessori schools need specific materials which were designed by Maria Montessori. The principals must understand what these materials are and know how to convince the central office to purchase these materials.

As an instructional leader, the Montessori principal should be a visionary who is out and around the school and community creating a visible presence for staff, students, parents, school board, and school district administrators at both the physical and philosophical levels. The principal should publicly advance knowledge about the nature of their Montessori school (if he/she has the knowledge to do this). The Montessori principal should support the following characteristics of the Montessori school: The three age/grade classroom environment, individualized instruction instead of group lectures, uninterrupted morning and afternoon work sessions where students choose their work, the purchase of concrete Montessori materials in all subject areas, the cosmic education theme which uses history and science as the core of the curriculum, mastery learning, subject integration, and the use of parent/teacher conferences to discuss student progress in all areas of development (social, physical, and academic) instead of using letter grades.

The Research Problem

This study describes instructional leadership practices of Montessori public school principals from the Montessori teachers' perspectives.

Questions

- (1) What practices do Montessori principals engage in when responding to their most difficult instructional leadership job/responsibility in Montessori public schools?
- (2) What practices do Montessori principals engage in when responding to their most frequent instructional leadership job/responsibility in Montessori public schools?

Definition of Terms

Qualitative Research

Qualitative research is defined by Kirk and Miller (1986) as a particular tradition in social science that fundamentally

depends on working with or watching people in their own territory and interacting with them in their own terms.

Qualitative research as described by Kirk and Miller (1989) is a four phase affair: (1) invention denotes a phase of preparation; (2) discovery denotes a phase of observation or data collection which produces data; (3) interpretation denotes a phase of analysis; this phase produces understanding; (4) explanation denotes a phase of communication which produces a message.

The researcher begins to collect data, looks for key practices in the data that become categories of focus, collects more incidents to add to the categories, writes about the practices which are in the data, works with the data to discover relationships, and continues writing as the analysis focuses on the core categories. This is described by Bogdan and Biklen (1992) as constant comparative analysis.

Focus Group Interview

"The contemporary focus group interview generally involves eight to twelve individuals who discuss a particular topic under the direction of a moderator who promotes interaction and assures that the discussion remains on the topic of interest" (Stewart & Shamdasani, 1991, p. 10). Focus groups produce a very rich body of data expressed in the respondents' own words, but a balance must be struck between what is important to the members of the group and what is important to the researcher (Stewart & Shamdasani, 1991).

Instructional Leadership

Instructional leadership is defined by Smith and Andrews (1989) as: (1) providing the necessary resources so that the school's academic goal can be achieved; (2) possessing knowledge and skill in curriculum and instructional matters so that teachers perceive that their interaction with the principal leads to improved instructional practice; (3) being a skilled communicator in one-on-one, small, and large-group settings;

and (4) being a visionary who is out and around the school creating a visible presence for staff, students, and parents at both the physical and philosophical levels concerning the nature of the school.

Montessori Public Schools

Montessori public schools are schools found in public school districts in the United States that have Montessori trained and/or certified Montessori teachers who use the Montessori philosophy, teaching methods, curriculum, and concrete materials to teach the children in their classrooms. These schools have three age/grades in each classroom, they use individualized instruction instead of group lectures, they have uninterrupted work sessions where students choose their work, they use the Montessori concrete materials in all subjects areas, they use cosmic education at the elementary level which uses history and science as the core of the curriculum, and they do not use letter grades on report cards.

The Montessori Method. The Montessori method of education is described by Standing (1966) in the following twelve points: (1) based on years of observation of the child's nature by Maria Montessori; (2) proved throughout the universe-- race, color, climate, nationality, social rank, or type of civilization does not affect outcomes; (3) based on the child as a lover of work, and work carried out independently; (4) based on the child's natural need to learn by doing. Each stage of the child's mental growth is challenged and stimulated; (5) offers the child spontaneously self-directed scholastic attainment; (6) offers an active discipline which originates from within the child and is not imposed from without; (7) based on a profound respect of the child, and allows a large measure of liberty which forms the basis of real discipline; (8) enables the teacher to deal with and guide each child individually and to guide each child according to individual requirements; (9) permits each child to work at his/her own pace; (10) encourages each child to help others; (11) provides each child the opportunity to choose his/her own work which frees him/her from a feeling of

CHAPTER II

ANALYTICAL REVIEW OF LITERATURE

The literature and research review will focus on these areas:

- (1) Historical and philosophical aspects of the Montessori method of education;
- (2) Montessori research in education;
- (3) Preparation programs for school administrators including the Montessori administrators;
- (4) Instructional leadership factors and studies;
- (5) Leadership theories.

Historical and Philosophical Aspects of Montessori Education

Maria Montessori (1870-1952) was the first Italian female physician. She developed a special method of teaching young children after working with mentally retarded children.

Montessori began to study the "physiological education" methods of Edouard Sequin and Jean Itard.

Soon after 1898, Rome's minister of education selected Montessori as director of the state Orthophrenic School. Montessori considered her classroom experience her "true degree in pedagogy" (Deighton, 1971).

From 1896-1907, she taught at the university level in Rome. In 1907 she opened her first Casa dei Bambini (Children's House) where she adapted her pedagogy to normal children. Maria Montessori started the preschool program in 1907 with the two-to six-year-old curriculum. In the preschool environment, the young children enjoyed a beautifully prepared environment of multi-sensory materials laid out in an ordered sequence that allowed children to both enjoy and succeed at learning. The children were in multi-age groups that corresponded to developmental stages and allowed interaction and modeling among the younger and older children (Cohen, 1989).

In 1912, The Montessori Method became a best seller in the United States, with the first Montessori school opening in 1912 in Tarrytown, New York. From 1912 to 1914 the Journal of Education published 22 articles about Montessori (Matheson, 1989). Montessori's first visit to the United States was in 1913, and two years later she taught a course at the Panama-Pacific Exposition in San Francisco.

During the early 1940s, Montessori spent five years training teachers in India. She had to close her schools and leave Italy during the years of World War II.

In 1953 a Montessori renaissance was started by Nancy Rambusch's article in Jubilee. The American Montessori Society was founded in 1960.

In 1935 Montessori (Montessori, 1973) devised her elementary program which was developed for the child's second plane of development, which includes ages 6-12. The characteristics she considered were the child's intellectual, moral, social, and emotional needs. John H. Pestalozzi and John

Dewey also expressed the doctrine that the whole child must be educated (Doughton, 1935; Hildreth, 1966).

The starting point in the Montessori elementary program is Cosmic Education (Montessori, 1973), which includes a unique vision of the world. This centers around the child's understanding of the cosmic task of each element in our cosmos and shows the interrelationships of each area of study. The elementary children, as described by Montessori (1973), are in their "sensitive period of culture" which enables them to study the world through all aspects of history, geography, science, geometry, and math. The Montessori method also argues that the elementary children are in their sensitive period for imagination which makes creative writing, composition, and research an important part of the curriculum.

Montessori Research

The review of research about children attending Montessori programs, both private and public, reveals several important points and strengths.

Miller and Bizzell (1983) show that children who had pre-kindergarten Montessori schooling exhibited significantly higher achievement in math at seventh and eighth grades than other groups. Karnes (1982) finds higher school success ratings and the highest percentage of high school graduates among her Montessori group. Jones and Miller (1979) find that the long-term effects of four different preschool programs on sixth and seventh grade students showed that the Montessori children were consistently superior over those students from the other three preschool programs. Sciarra and Dorsey (1976) in their study show that the children who had early Montessori training score higher on subtests of the Metropolitan Achievement Test administered at sixth grade level than those children who had Head Start or no preschool experience.

Stodolsky and Karlson (1972) demonstrate that the Montessori curriculum is effective over a two year period in nurturing continuing development in areas of visual-motor integration, matching and sorting skills, psycho-motor skills, and in number concepts. Berger (1969) finds that Montessori

trained children did consistently better on certain perceptual tasks than traditional nursery-school children did. Seefeldt (1977) shows that children with prior Montessori experience scored significantly higher in kindergarten on the Caldwell Achievement Test than did children without this experience. Erickson (1969) shows Montessori four-year-olds scored at the first grade level or above on every test given in this research study. This research, however, also shows there was a significant difference in favor of the direct instruction group on the Auditory-Vocal Association subtest and in favor of the Montessori group on the Visual Decoding subtest. These research studies suggest that children with a Montessori experience often were able to perform significantly higher on a number of tests than children without a Montessori experience or with alternative school experiences.

Bereiter and Engelmann (1966) and Karnes (1977) conducted research on the learning styles of disadvantaged children and it shows that the traditional public school kindergarten was not appropriate for these children. This

finding suggests that alternative instruction, including Montessori, might be more suitable for disadvantaged children because it includes more tactile experiences, an ungraded environment, and certified teachers who use observation to guide each child individually according to the child's needs and abilities.

There is no research in the area of Montessori administration but research continues to show how important administrators are to successful schools.

Preparation Programs for School Administrators

"Despite the earnest efforts of various reformers, educational administration today remains much as it was a decade ago" (Duke, 1992, p. 768). Stover (1990) states that research continues to show that schools are only as good as their administrators.

Two areas of concern are included in the review of school administrator's preparation programs. The first area of review involves both what professionals believe are the

problems in school administration training (Forsyth, 1992; Koerner, 1992; Strover, 1990; Polite, 1990; Hallinger & Murphy, 1991) and suggested remedies (Polite, 1990; Hallinger & Murphy, 1991; Playko, 1991; Sergiovanni, 1991; Stover, 1990; Duke, 1992; Troisi and Kidd, 1990; Bacharach & Coney, 1986; Cambron-McCabe & Foster, 1990; Heller, 1987; Vornberg, 1987; Smith, 1987; Schueckler, 1987). The next topic includes the Montessori training programs for educational administrators in Montessori schools (Rosen, 1992; Otis, 1992; Kripalani 1992).

Problems With and Proposed Preparation Programs for Educational Administrators

Forsyth (1992, p. 24) states that "there is no common vision of what school administrators should know and be able to do." She suggests two reasons for this: (1) university professors who determine university course subjects are isolated from public school, and (2) administrators who are in the field have been radically constrained by unimaginative practice and goal ambiguity. "Both groups are inexplicably

perplexed by call for radical reform; they don't know what all the fuss is about" (Forsyth, 1992, p. 24). She goes on to observe that the purpose of educating school administrators should be to assure that knowledge and skill related to the improvement of teaching and learning is the focus of the experience. This includes being able to scan, analyze, and reflect about people, processes, information, and systems that are relevant to teaching and learning.

Forsyth (1992) asserts that preparation for school administrators should gradually give candidates authority and access to increasingly realistic settings until the person is licensed to practice independently. This training process should include: (1) studying the theory, research, and clinical writing organized around administrative problems of practice; (2) practicing mentoring in standardized problem finding and making sense of these problems; (3) practicing collaborative problem-finding and decision-making simulations; (4) experiencing field residency to include assignments in cooperating schools with limited authority, some

responsibility, a salary, a field mentor, and return weekly to the university for a seminar; and (5) experiencing an internship for a probationary period of actual practice with mentoring, support, and a system of feedback available to the interns. The concept of state licenser and present licensing procedures may have to be changed to support this new approach to preparation of administrators.

Tom Koerner (1992), editor of the NASSP Bulletin, interviewed Arthur E. Wise, president of the National Council for Accreditation of Teacher Education. Arthur Wise states that principals using site-based decision making in their schools should have training and competence in organizational behavior, strategic planning, and team building/consensus-building skills (Koerner, 1992).

As many see it, thousands attending today's university programs in educational administration are receiving an inferior education that will leave them ill-prepared to take the responsibility of a school (Stover, 1990). The National Policy Board for Educational Administration (Stover, 1990) has

proposed reforms, but many say their reforms are not suitable because the Board failed to seek educators' opinions before they published their reform proposals. Stover (1990) continues by listing the general Board recommendations: (1) take two years of full-time study including one year of fieldwork, (2) pass a national certification examination, and (3) obtain a doctorate before taking charge of a school. Duke (1992) recommends several changes; one would be to have the local school systems assume responsibility for preservice education of principals by providing a district-based internship and orientation program for a period of three years. After the three years, a school administrator would qualify to apply to a graduate principal preparation program at a university. This would allow the individuals to bring questions about the effectiveness of certain practices as well as an assortment of practical experiences against which to compare theory and research. (Duke, 1992).

Three years of experience would coincide with Troisi and Kidd's (1990) statement that only time in the trenches can translate knowledge into wisdom. A number of administrators fail to

become leaders not because of their lack of technical skills but rather because of their lack of people skills and their inability to exercise good judgement (Troisi & Kidd, 1990). Duke (1992) mentions that universities are often best equipped to offer inservice programs because the university faculties are best prepared to provide insights, understandings, and knowledge derived from research and theory.

Duke (1992) recommends select educational administration programs in the universities which could be designated as centers for specialized doctoral work in areas such as the administration of magnet schools. Bacharach and Coney (1986, p. 642) state that, "Researchers have produced evidence that effective schools maximize the coordination of programs and increase the discretion of individual teachers." The principals of effective schools who are strong leaders make conscious efforts to minimize the difference in status that exists between themselves and their teachers.

Polite (1990) mentions a variety of interpersonal skills needed to be an effective school administrator in the role of

instructional leader. These skills include being able to relate to people, being sensitive to the needs and interests of other individuals, and having skill in effective listening. Polite (1990) reports that at Southern Illinois University in 1990 a course entitled "Human Relations Skills for Administrators" was added to their curriculum in order to provide opportunities for teaching and practice of the skills associated with effective interaction. This course was offered in a workshop format, meeting daily in order to provide the opportunity to develop quickly an environment of trust and rapport between students and the instructor. This allowed the students to integrate and practice interpersonal skills.

Hallinger and Murphy (1991) mention that there is a lack of attention to the techniques of effective teaching, organizational processes, or curriculum, which are the technical core of schooling. Administrative training, traditionally, was provided by the universities and school districts. "Today, intermediate service agencies, research development centers, professional associations, and state education departments are

the most visible providers of training and development services to school leaders" (Hallinger & Murphy 1991, p. 517). Now a large number of the administrative development services are using practicing administrators to assist in activities ranging from defining needs to delivering instruction. Unfortunately, seldom do these development services provide support to those trying to implement the new knowledge and skills into their schools. Thus the institutionalization of practices like coaching, mentoring, and cross-school visitations with feedback depend on individual administrators.

Hallinger and Murphy (1991) state that improved research on various approaches to administrative development must be done. There should be an extensive induction program for all new administrators to include periodic on-site support and open access to assistance. The administrative training should include a focus on curriculum and instructional leadership (Hallinger & Murphy 1991).

Plyko's article (1991) discusses administrative mentoring as a way to encourage new administrators to take the

risks needed to become instructional leaders. Mentoring is a method of being supportive and encouraging to a protege. Mentoring is a vital part of the developmental processes associated with the preparation, induction, and ongoing education of individuals. Experienced administrators can help proteges in facilitating both change and student learning. Plyko (1991) lists the following five areas in which mentors can provide assistance to other administrators:

(1) gaining knowledge of the district's curriculum and available instructional resources; (2) sharing information about leadership practices that are effective in helping teachers improve their instructional skills and classroom management techniques; (3) serving as role models for completing managerial tasks; (4) sharing effective practices and strategies for developing positive school-community relations; and (5) helping proteges to formulate personalized insights about how to develop a productive, satisfying work environment for teachers so that student learning outcomes may be improved. (p. 126)

Another possible response to improving instructional leadership for principals would be in the area of principal development programs (Andrews, 1989) to assist principals in the area of formal mentoring (Playko & Daresh, 1989). Hall and

Lutz (1989) suggest a clinical field experience for principals which would include instructional leadership practices.

Besides mentoring, a full-time internship for prospective administrators continues to be practiced in many places. The Loyola University internship (Heller, 1987), one of the early internship programs, focuses on instructional leadership. East Texas State University's (Vornberg, 1987) internship program focuses on an inservice component, which takes the trainees into the schools, and a preservice component, which requires the trainees to go to classes at the university. In 1980 Texas A&M University (Smith 1987) introduced an internship program for graduate students seeking a doctorate in Educational Administration. The Texas A&M internship program requires that after the students have completed their residency and mid-management requirements they must go into the schools and do a residency that meets the specific needs of each student in training. Throughout the year A&M University sends an internship supervisor to visit the schools on several occasions to observe the student's progress first-hand (Smith,

1987). Sergiovanni (1991) writes that a new definition of professionalism for educational administration should be created. He is proposing that teaching become a natural springboard into administration which would bring educational administration and teaching closer together. He is against lengthier study, higher certification requirements, the use of certifying boards, and higher degrees for educational administration because that might cause a program weighted more toward management themes and further widen the rift that now separates teaching and administration. Sergiovanni (1991) believes more emphasis for educational administrators should be on the ability to serve purposes, commitments, and values that are shared with parents and teachers.

Cambron-McCabe and Foster (1990) presented a paper at the annual convention of the University of Council for Educational Administration. They explained the recasting of Miami's doctoral program along the lines identified by reformers. Since school administrators are to provide transformative leadership, the educational programs of the

administrators focus on intellectual, moral, and technical practice. To accomplish the goal of critical practice, the Miami program includes the doctoral core, major, and research components. The core courses (Culture and Education, Ethics and Education, and Power and Schooling) are intensive, involving significant student participation in seminars, case studies, and Freireian-type "problem-posing" situations (Cambron-McCabe & Foster 1990). The core courses link theory to practice by requiring students to address a concrete school problem or issue in a particular school site.

To emphasize the professional practice or clinical nature of administration, the faculty endorsed a problem-based teaching approach for the coursework in the doctoral major. The three culminating seminars in the major are problem-based. The transformative leadership seminar is directed toward the technical aspects of transforming schools rather than just maintaining existing schools.

The research component of the program consists of no fewer than 12 semester hours in research and the dissertation

(Cambron-McCabe & Foster, 1990).

Proposed preparation programs in educational administration could include specific plans for administrators in the field of Montessori education.

Montessori Training Programs for Educational Administrators in Public Montessori Schools

Rosen (1992) asserts that new creative and research based methods of providing preparation for Montessori principals and administrators in all unique situations might help them solve some of the problems they face in the public Montessori schools today. Rosen, a former Montessori principal in Buffalo, N.Y., has made an interesting observation that fully trained Montessori teachers who became principals in public schools could not handle the complex social organization of a large urban school district. Their problem areas might include lacking the flexibility needed to balance the mandates of the school district with the goals of the traditional Montessori program. She has also seen dynamic public school administrators who did quite well taking over a Montessori

school without the Montessori training. Her personal preference is the dynamic, secure educator who enjoys new challenges and has the clout necessary to get adequate program support from the top school officials (Rosen, 1992). She recommended that a Montessori teacher who has been in the school district for a number of years complete the administration requirements and become a school principal. This would fit what Carol Shakeshaft (Strover 1990, p. 19) describes when she says, "If school executives are to learn about curriculum development they must work on actual curriculum projects."

Jill Otis, who has finished her tenth year as a public Montessori principal in New Orleans, has also expressed a concern that, "The philosophy gives us our essence, and the principal must work to ensure the school's adherence to its philosophy. However, a philosophy can never remain static, but rather must continually evolve as the school evolves" (Otis, 1992, p. 11). Otis notes that it takes great skill to make the state mandates and the Montessori pedagogy work together. "Keeping the creeping encroachment of traditionalism at bay

becomes the difficult job. This encroachment is insidious and pervasive and comes from fear" (Otis, 1992, p. 11). She feels that Montessori principals need a thorough comprehension of the Montessori curriculum plus administrative training. Martin (1992), as a Montessori administrator for 13 of his 23 years in administration, also states that Montessori administrators must be immersed in the Montessori philosophy and methods.

"A principal in a Montessori school must familiarize him/herself comprehensively with the unique principles of Montessori pedagogy and its practice" (Kripalani, 1992, p. 2). The principals need to understand that the goal of Montessori education is to help each child develop his or her unique potential in a heterogeneous grouping of mixed ages. The Montessori environment must be responsive to the changing needs of all Montessori children. This requires extensive involvement and the cooperation of parents, the business community, and the general community. "We need special seminars/workshops to prepare principals for the venture"

(Kripalani, 1992, p. 2).

In the following section instructional leadership factors and studies are described. Preparation programs for school administrators should include training in the area of instructional leadership.

Instructional Leadership Factors and Studies

The instructional leadership literature review will emphasize and identify instructional leadership practices and options available to principals.

Instructional Leadership Defined In Literature

Instructional leadership has a number of components and requires principals who: (1) instill a vision of excellence and ownership in their schools (White-Hood, 1991; Andrews, Basom, & Basom, 1991; Rosen, 1992); (2) help teachers focus on new classroom instructional techniques (Fraser & Melton, 1992; Bernd, 1992; Kaiser, 1992; Richardson, Fanigan, & Blackburn, 1991); (3) weave together all their instructional leadership behaviors in a holistic way (Daresh, 1991; Lane, 1992; Hallinger,

1986, Stronge, 1990), (4) practice professional growth and reflection (Lee, 1991); (5) provide staff development designed according to current research (Sparks, 1992A; Hansen & Smith, 1989); (6) define "Instructional leadership" as "transformational leadership" (Leithwood, 1992); and "instructional leadership" defined as including both "direct" and "indirect" instructional leadership (Kleine-Kracht, 1993; Peterson, 1989; Liu, 1984; Daresh & Liu, 1985; Daresh, 1989).

An essential aspect of instructional leadership is the ability to instill ownership among all members of the school community and instill a vision of excellence for the school among its members (White-Hood, 1991; Andrews, Basom & Basom, 1991; Rosen, 1992). White-Hood (1991) includes the entire school management unit as an integrated part of one's instructional leadership focus. Principals should arouse ownership among staff members, students, parents, and faculty. As a Montessori principal, Rosen (1992) states that the instructional leadership role is especially critical for Montessori principals and it includes articulating a vision of

excellence throughout the entire Montessori community with an emphasis on the Montessori philosophy and curriculum. In schools where student achievement is high, the principals profess, and get other people to articulate that, their school is going to be great (Andrews, Basom & Basom, 1991).

Another essential aspect of an effective instructional leader is the willingness to empower teachers (Fraser & Melton, 1992; Bernd, 1992; Kaiser, 1992; Richardson, Flanigan, & Blackbourn, 1991). At the National Council of Professors of Educational Administration, Richardson, Flanigan, and Blackbourn (1991) affirmed that leadership alone will not suffice for the principal in quest of excellence in schools. "The quality principal must be a person who makes instructional quality the top priority of the school, and must be able to bring that vision to realization. Therefore, instructional leadership and excellence are inseparable and essential elements in a quality school" (Richardson, Flanigan, & Blackbourn, 1991, p. 6). They summarize the skills of effective principals as including opportunities for staff development, providing for adequate

resources, sharing information about how to provide high quality instruction, and providing opportunities for group problem solving.

As a principal at J. J. Hill Public Montessori School in St. Paul, Minnesota, Kaiser (1992) states that the primary characteristic necessary for a principal of a Montessori school is a commitment to encourage the Montessori teachers to feel a sense of focus and empowerment to teach the best Montessori program possible. This characteristic would require the principal to understand the Montessori form of teaching.

"Teacher empowerment loses its effectiveness if the teachers do not have an instructional leader to keep them on track, well-informed, and involved. The principal must fill this role" (Bernd, 1992, p. 64). This can be achieved if the principal encourages decisions that result in greater alignment among curriculum and teacher directed practices (Bernd, 1992). Also the principal should ensure that teaching decisions are based upon appropriate research or professional practices (Hansen & Smith, 1989):

For instructional leadership to be effective, the principal's interaction with the rest of the school is very personal and takes a great deal of planning (Lane, 1992; Daresh, 1991; Hallinger, 1986; Stronge, 1990). Daresh (1991) identifies effective instructional leadership behaviors in a holistic way or as an important part of the principal's total leadership responsibility. Likewise, Stronge (1990) calls instructional leadership successful only when the principal has a global view of the complete educational enterprise. The six effective instructional leader characteristics Strong (1990) identifies are not meant to be viewed as independent behaviors but, rather, to be woven into the total pattern of leadership behavior. The characteristics according to Daresh (1991) are:

- (1) gaining awareness of personal beliefs, (2) understanding their organization, (3) providing continuous instructional leadership, (4) developing sensitivity to alternative perspectives, (5) committing to continuous improvement of teaching activities, and (6) respecting and understanding people. (p. 110)

The principal's instructional leadership role will be maximized only when it is applied within a broader, cultural

perspective of the principalship. Lance (1992) states the following:

Once principals have developed an understanding of the underlying key values that drive the school's instructional culture, they can begin to channel their efforts toward reinforcing or reshaping these values through the actions of cultural leadership. That is, through thoughts and deeds these principals work to directly and indirectly influence the underlying cultural systems which support all instructional activities. This cultural leadership consists of three operational modes: culture assessment, culture building, and culture brokering. (p. 91)

Principals who practice professional growth and reflection are seen as putting energy toward effective instructional leadership. Much of the work done by principals is unseen or "invisible" (Willis, 1980). According to Lee (1991):

By developing site administrators' own capacity to engage in conscious reflection and interpretation--become more aware and articulate about the sense they make of their own work--they not only develop their own skills but also serve as a model of this form of professional behavior for the staff. (p. 87)

The role of the principal as instructional leader is one of spanning boundaries. This includes promoting growth among the teaching staff. The principal as instructional leader is the

fundamental partner in implementing and conducting staff development programs (Hansen & Smith, 1989). Sparks (1992A) includes as part of the principal's boundary several factors such as promoting risk taking behaviors, promoting new things as the norm, promoting collaborative experiences among the staff, promoting development that is designated according to current research, and promoting staff development that involves many different forms.

Of all the articles reviewed, only Leithwood (1992) states that instructional leadership should be subsumed by transformational leadership. Transformational leadership evokes a more appropriate range of practice for today's administrators in light of current restructuring initiatives designed to take schools into the 21st century. The term "instructional leadership" focuses administrator's attention on "first-order" changes, which is defined as improving instructional activities by the monitoring of teachers' and students' classroom work. However, Leithwood (1992) states that instructional leaders should also make "second-order

changes" which involve building a shared vision, improving communications, and developing collaborative decision-making processes.

Instructional leadership has been defined to include both "direct" and "indirect" instructional leadership (Kleine-Kracht, 1993; Peterson, 1989; Liu, 1984; Daresh & Liu, 1985; Daresh, 1989). "Direct instructional leadership has a 'hands on' and 'face to face' quality and can be associated with discrete activities" (Kleine-Kracht, 1993, p. 188). Daresh and Liu (1985, p. 7) stated that "direct instructional leadership occurs when the principal improves the instructional practices through such behaviors as supervision, evaluation, or inservice."

"Indirect instructional leadership activities are behaviors that deal with the school's internal and external environment, the physical and cultural context surrounding the classroom, teaching, and curricula, and the meanings that principals' actions have for teachers" (Kleine-Kracht, 1993, p. 189). Daresh and Liu (1985, p. 7) commented that "indirect instructional leadership is provided when the principals,

through the support functions such as instructional facilitation, resource acquisition, building maintenance, and student problem solving, took action with the intention of facilitating instruction."

Research Reported on Instructional Leadership

Research on instructional leadership includes information about methods of assessing instructional leadership (Prickett, Richardson, Short, & Lane 1990; Ahadi, 1990) and studies which have actually assessed areas of instructional leadership in different settings: Wright, 1991, Ahmed, 1981; Stronge, 1988; Rallis, 1988, Tallero & Blumberg, 1991; High & Achilles, 1986, Chance, Work, & Larchick, 1991; Hannay & Stevens, 1984; Kleine-Kracht, 1993; Daresh & Liu, 1985; Liu, 1984.

Prickett, Richardson, Short, and Lane (1990) presented a paper at the 1990 Annual Conference of the National Council of Professors of Educational Administration. Prickett observed that research indicates the skills and qualities (goal setting,

managing curriculum and instruction, supervising and evaluating teaching, providing staff development, managing resources, and promoting a positive climate and expectation for success) the instructional leader should have, but research is lacking in how these skills and qualities are to be assessed (Prickett, Richardson, Short & Lane, 1990; Ahadi, 1990). This presentation reveals that a five-phase model of assessment for instructional leadership has been conceptualized and is undergoing development for evaluation to determine effectiveness and validity. The five-phase model includes: (1) interviews that probe the participant's awareness and understanding of skills and functions of the instructional leader; (2) instructional management skills; (3) strategic planning and empowerment skills; (4) participant's presentation skills; and (5) feedback and professional growth skills (Prickett, Richardson, Short, & Lane 1990).

Ahadi (1990) published, through the National Center for School Leadership, a project report in which the results shows substantial agreement between principal and teacher ratings of

instructional leadership. Factor analysis indicate that teacher ratings are influenced by their perceptions of school culture. However, teacher ratings of instructional leadership clearly appear in this study to be diagnostic of effective school functioning (Ahadi, 1990). The report states that teacher ratings of instructional leadership, using the Instructional Leadership Inventory, have questionable validity in identifying specific principal behaviors that contribute to school effectiveness and the principal behaviors that indirectly affect student success in academic outcomes.

Wright (1991) explains that since teaching and learning are the most important activities in schools, principals might spend the majority of their time as instructional leaders (Wright 1991). However, studies of principals at their jobs have found that one is more likely to see principals spending relatively little time on task as instructional leaders (Ahmed, 1981; Stronge, 1988). This article states that new directions, including implementation of school based management, modification of time management, and improvement of change

leadership, would enable principals to minimize the fragmentation of their time and provide effective leadership (Wright 1991).

In a Pennsylvania State University dissertation Ahmed (1981) determines that the actual and ideal roles of elementary school principals are different. The ideal highest role of school principals in this study is "instruction and curriculum development" and the actual highest role is "staff personnel." Similarly, in another study, Stronge (1988) determines that elementary school principals in Illinois spent only eleven percent of their time on instructional leadership activities because of managerial tasks. This indicates that if principals are to be the primary instructional leaders, a drastic role change would need to be implemented in schools like the ones in the Illinois study. However, another answer to instructional leadership concerns would be to empower teachers as instructional leaders (Rallis, 1988).

Tallerico and Blumberg (1991, p. 316) write: "There is a need to connect the perspectives of teachers with the

administrative structuring of the workplace." This study identifies some conditions under which teachers engage in meaningful dialogue about the core of their work. It also identifies some specific examples of how administrators can provide the necessary opportunities for this dialogue to happen, which is interpreted as a way for principals to practice instructional leadership (Tallerico & Blumberg, 1991).

High and Achilles (1986) conducted a study to analyze influence-gaining behaviors of principals in schools of varying levels of instructional effectiveness. Principals included in this study were perceived to gain influence in the following ways. (1) In high-achieving schools the principals were perceived by the teachers as exhibiting expertise, norm setting, and legitimate authority to the highest degree, whereas the behaviors of coercer and enabler were least exhibited. (2) In high-achieving schools the principals rated themselves highest in referent and legitimate authority behaviors and lowest in involver and coercer behaviors. (3) In an Implementation survey principals in high-achieving schools were rated highest in

referent and expert behaviors, and rated lowest in involver, coercer, and norm setter behaviors. In summary, High and Achilles (1986, p. 114) write "there are perceived differences between the influence-gaining behaviors of principals in high-achieving schools and principals in other schools." High and Achilles (1986) suggest: (1) Prospective administrators might research the beginnings of the principalship to understand that their roots lie in instructional leadership; (2) administrators might survey their teachers to determine what expertise is valued most and plan in-service activities to respond to these needs; (3) administrators might study the practice called "principal-as-expert" to see if it offers the most potential for influencing teachers toward school improvement.

Chance, Work, and Larchick (1991) presented a paper at the Annual Convention of the National Rural Education Association. They reported on how the Little Axe School District administrators and teachers took the research regarding the Effective School Movement and embarked on an extensive school improvement program. In their research, they

found that effective schools were characterized by: (1) strong instructional leadership; (2) high expectation of achievement for all students to learn; (3) orderly and positive climate that supports learning; (4) carefully developed instructional focus; and (5) regular measurement of student learning. One dimension of this process involves having staff from the University of Oklahoma, utilizing a case-study approach, conduct research to analyze the principals specifically under Instructional Leader Correlate, which is one correlate of an Effective Schools Program (Chance, Work, & Larchick, 1991). This was done because "many studies have reported that a strong building leader can help create the type of environment and school culture needed to improve the quality of a district's instructional program" (Chance, Work, & Larchick 1991, p. 12).

Hannay and Stevens (1984) did a study on the indirect instructional leadership influence evidenced by one principal on the curriculum of a K-5 elementary school. According to Hannay and Stevens (1984):

The finding provided another avenue to interpret the managerial nature of the principalship. Direct curriculum leadership occurs when the principal intends to improve instructional practice through such activities as evaluation or inservice. Indirect curriculum leadership is provided when the principal, through managerial tasks, takes action with the intention of influencing the curriculum.

Direct and indirect leadership exist within school climate. The principal is involved in establishing and perpetuating a school climate. When the principal intentionally creates a climate that is conducive to effective instruction that principal is an instructional leader. The principal, involved in this study, created a school climate that was professionally and personally supportive. The intention to influence the curriculum was continually evident in personal interactions and work patterns of the principal. (p. 26)

Kleine-Kracht (1993) case studies describe one principal's reliance on primarily indirect instructional leadership behaviors. The principal interacts with the teachers and students informally while the division chairs interact formally with teachers about curriculum and methodology. The Township District's building-level administrative structures also support the principal's exercise of indirect instructional leadership by allowing the principal freedom to be in charge of improving instruction and working with teachers (Kleine-Kracht, 1993).

Daresh and Liu (1985) reported their research on instructional leadership at an American Educational Research Association meeting. They used a questionnaire designed to identify the extent to which principals believe that they are engaged in various direct and indirect instructional leadership behaviors. These are clustered into six separate scales: staff development, teacher supervision and evaluation, instructional facilitation, resource acquisition, building maintenance, and student problem resolution. This study (Daresh & Liu, 1985) provides evidence that high school principals engaged in more indirect instructional leadership than direct. "The findings also provided implications related to the preservice training, initial selection, and ongoing inservice support of high school principals" (Daresh & Liu, 1985, p. 9). Daresh and Liu (1985) recommend that high school principals should take training in the area of instructional leadership.

◊ Liu (1984, p. 90) states in a dissertation, "The high school principals engaged in more indirect instructional leadership than direct regardless of the quality of a particular

school (effective, average, and not effective)." This study reveals that a principal's ability to assume the role of instructional leader significantly influenced the school effectiveness. This study also suggests that principals need to return to the role of lead teacher and actively assume the role of instructional leader providing for teacher inservice, clinical supervision, teacher evaluation, instructional support, resource acquisition, building maintenance, and assistance in student problems.

The Managerial Grid, Theory X and Theory Y, and Transactional Leadership Theory and Transformational Leadership Theory are described and contrasted in the next section.

Leadership Theories

The leadership theories described below include: (1) The Managerial Grid by Robert Blake and Jane Mouton, (2) Theory X and Theory Y by Douglas McGregor, and (3) Transactional Leadership Theory and Transformational Leadership Theory by

James MacGregor Burns. Blake and Mouton (1978) were selected to be representative of the situational approach to instructional leadership, others in this group include Hersey and Blanchard (1982) and Fiedler and Chemers (1974). McGregor (1960) was selected as representative of leadership theories that emphasizes the importance of life time employment, security, participation by employees in decision making, and management concern for the self-esteem of employees. Others in this group are Argyris (1957) and Ouchi (1981). Burns (1978) was selected for his seminal complex theory of leadership which includes an aspect of moral betterment.

Managerial Grid

Blake and Mouton (1978) developed the Managerial Grid. The Grid has two axes: one lists "concern for people" and the other an orientation toward a "concern for production." The concerns are not independent, but interact with one another as the manager works to solve problems (Hanson, 1985).

Blake and Mouton (1978) state that open communication between people permits sound problem solving and decision making. An organization is unlikely to succeed without open communication. The Grid concentrates on what makes communication effective or ineffective and how to change ineffective communication into effective communication.

Regardless of the specific purpose of an organization, there are several characteristics which seem to be universal (Blake & Mouton, 1978). The universals of an organization are: (1) purpose of the organization, (2) people of the organization, and (3) power flow of the organization. The third universal describes a hierarchical arrangement whereby some people are bosses and others are bossed. The boss' actions are dictated by certain assumptions he/she makes regarding how to manage (Blake & Mouton, 1978).

The Grid graphically represents the interaction of the three concerns, which are purpose, people, and power. Getting results or production is one concern. Production can be increased in schools by finding, through research or experience,

new ways of increasing student achievement. A second concern is for people and recognizing them as individuals. Some leaders realize that working conditions, salary, fringe benefits and job security are very important for their workers. "Depending upon the character of concern, subordinates may respond with enthusiasm or resentment, involvement or apathy, and commitment indifference" (Blake & Mouton, 1978). The third concern is how the organization uses the power hierarchy to achieve production with and through people.

Concern for production and concern for people are pictured on the Grid on a nine-point scale where (1) represents minimum concern, (5) represents intermediate or average concern, and (9) represents maximum concern. The other numbers denote degrees of concern.

The manner in which these two concerns are linked together defines the use of power. For example, when high concern for people is coupled with low concern for production, the people involved expressed they were "happy," but when high concern for people is coupled with high concern for production,

the people strived enthusiastically to contribute to organizational purposes (Blake & Mouton, 1978).

It is important to remember that when a manager confronts a situation in which work is to be accomplished through people, there are alternative ways for him to go about managing. To be a good manager, he/she needs to know and be able to select the best course of action for any given situation (Blake & Mouton, 1978).

A manager's style is plotted by scoring him or her from one to nine on each dimension.

(1,1) impoverished: Minimum effort exerted to get work done and is barely sufficient to sustain organizational membership.

(9,1) Task: Efficiency in operations are arranged so human elements interfere to a minimum degree.

(5,5) Middle-of-the-road: Organizational performance is balanced between getting work out and maintaining staff satisfaction.

(1,9) Country Club. Thoughtful attention to needs of people which leads to friendly and comfortable organization atmosphere.

(9,9) Team Approach: Work accomplishment is from committed people; common purpose leads to relationships of trust and respect (Black & Mouton, 1978).

The scores together describe the managerial styles. The team approach leads to the best results in most organizations.

Theory X and Theory Y

In the 1950s Douglas McGregor produced two theories of leadership. Theory X (McGregor, 1960) states the following: (1) workers have an inherent dislike for work and will avoid it; (2) workers must be coerced, controlled, and directed to work toward the organization's goals; and (3) workers lack ambition, dislike responsibility, and want security. Practices associated with Theory X are essentially useless when the needs of the

teacher or administrator are essentially social or related to self-actualization (Hanson, 1985).

Instances of Theory X can be found in schools. Teachers, for example, work only under close supervision. "Few instances of teacher initiative can be found. Instead they seem to be defensive and preoccupied with maintaining the status quo". (Sergiovanni & Starratt, 1993, p. 16). McGregor argues that when teachers are not taking initiative, the problem may be more a lack of the administrators' expectations than the teachers' lack of initiative. Teachers are likely to respond in a negative way, sensing negative assumptions and expectations.

Theory X focuses on fulfilling the needs of the organization. "The central principle of organization which derives from Theory X is that of direction and control through the exercise of authority—what has been called 'the scalar principle'" (McGregor, 1960, p. 49). The requirements of the organization are given priority. If the personal goals of an individual are considered at all, it is assumed that the rewards of salary and position will satisfy him/her.

Theory Y is McGregor's alternative to Theory X. Hanson (1985) explains that Theory Y exhibits a positive orientation of the workers. Theory Y (McGregor, 1960) states the following: (1) Physical work and mental work are as natural as play, if they are satisfying; (2) workers will exercise self-direction and self-control toward an organization's goals if he is committed to them; (3) workers are committed to function for rewards, and the best rewards are satisfaction of ego and self-actualization; (4) the average worker can learn to accept and seek responsibility. Avoidance of responsibilities and emphasis on security are learned; (5) creativity, ingenuity, and imagination are widespread among workers and do not occur only in a select few; and (6) the intellectual potential of the average worker is only partially utilized.

Theory Y focuses on fulfilling the needs of the worker. If the needs of the worker are fulfilled, then the essence of organizational control shifts from external pressures (principal to teacher) to an internal sense of self-control and self-direction (Hanson, 1985). Building mutual trust and respect and

commitment to worthwhile objectives is basic to Theory Y. Success in work is assumed to be dependent on whether the exchange of valid and authentic information is present (Sergiovanni & Starratt, 1993).

If members of the organization can achieve their own goals while directing efforts toward the success of the organization, then the central principle of Theory Y has been achieved (McGregor, 1960). On the other extreme, if the organization ignores the personal needs and goals of the workers, then a negative result can occur. "The principle of integration demands that both the organization's and the individual's needs be recognized" (McGregor, 1960, p. 52).

Transactional Leadership and Transformational Leadership Theories

Burns (1978) describes transactional leadership occurring when one person makes contact with others for the purpose of exchanging something of value, whether economic, political, or psychological in nature. An economic exchange

could be a swap of goods or one item for money. A trading of votes between candidate and citizen or between legislators, could be a political exchange. A psychological exchange could be hospitality to another person in exchange for willingness to listen to one's troubles (Burns, 1978). Each person, whether teacher or principal or parent, recognizes the other as a person. Their purposes are related to the extent that the exchange of something of value stands within the bargaining process and can be advanced by maintaining that process. "The relationship does not go beyond this. The bargainers have no enduring purpose that holds them together; hence they may go their separate ways" (Burns, 1978, p. 19). Although he recognizes it as a transitory leadership engagement, he concedes it has a useful, legitimate function for those individuals involved in the transaction.

As Burns (1978) defines it, transactional theory must lead to short-lived relationships because sellers and buyers cannot repeat the identical exchange; the teacher and principal must move on to new types and degrees of gratifications. Also

the transactional gratification itself may be a superficial and trivial one.

According to Burns (1978) the relationships are often likely to be psychological:

Leader communicates with follower in a manner designed to elicit follower's response; follower responds in a manner likely to produce further leader initiatives; leader appeals to presumed follower motivations; follower responds; leader arouses further expectations and closes in on the transaction itself, and so the exchange process continues. (p. 258)

A transactional leadership act takes place, but it does not bind leader and follower to a higher purpose. The transaction may consist first of a gesture, smile, applause, promise, or letter, and later take a more tangible form like a vote for a leader in an election.

Burns (1978) states that transforming leadership occurs when leader and led engage with each other in such a way that leaders and followers raise one another to higher levels of motivation and morality. The leader and led are linked in a mutual support for a common purpose. Transforming leadership

raises the level of human conduct and ethical aspiration of both principal and teacher, thus having a transforming effect on both (Burns, 1978). Gandhi is perhaps the best modern example who aroused and elevated the hopes and demands of millions in India and whose lives were enhanced in the process.

Burns (1978) also defines transformational leadership as transcending leadership because it is a dynamic leadership. The leaders feel elevated and more active themselves because of the way they relate to followers and the successes they have together.

The leader is more capable of evaluating the motives of a follower, and the leader takes the initiative in making leader-led connections even in respect to communication and exchanges which may take place. The leaders take care of the followers' wants and needs, as well as their own, and thus serve to change the makeup of the followers' motive base through satisfying their motives (Burns, 1978).

Leithwood (1992) suggests that transformational school leaders provide the necessary incentives for individuals to

attempt improvements in their practices. Leithwood (1991) suggests further that transformational school leaders are in pursuit of three goals: (1) helping school personnel develop and maintain a collaborative, professional school culture by allowing staff members to plan together, and by giving teachers shared power and responsibilities; (2) fostering teacher development by encouraging them to set goals for professional growth, and establishing a school mission; (3) improving group problem solving by keeping the group on task, facilitating open discussion, avoiding preconceived solutions, actively listening, and summarizing information at the end of the meeting. These leaders share a genuine belief that their staff members as a group can develop better solutions than the principal can alone (Leithwood, 1992).

Under his four stages of leadership for school improvement, Sergiovanni compares his "leadership by building" and "leadership for bonding" or "valued-added leadership" to Burns' transformative leadership. Initially transformative leadership takes the form of "leadership by building" since the

focus is on arousing human potential, and both leader and follower are motivated to a higher level of commitment and performance. Finally, transformative leadership takes the form of "leadership by bonding" when leadership becomes moral because it raises the level of ethical conduct of both leader and led, thus transforming both.

Sergiovanni and Starratt (1993) explain that transformational leadership in schools involves an exchange among people seeking common aims which calls people's attention to the basic purposes of the organization. Values such as freedom, community, equity, justice, and brotherhood are important as part of transformational leadership.

"Transformational leadership changes people's attitudes, values, and beliefs from being self-centered to being higher and more altruistic" (Sergiovanni & Starratt, 1993, p. 187).

Transformational leaders are inspirational, intellectually stimulating, and considerate of individuals.

A moral approach to leadership is to use a theory that fits people better in the first place. The utilization of a

leadership theory must not only enhance teaching and learning, it must fit human nature. Moral leadership taps the spirit. Is the leader honest, sincere, and caring? Does the leader represent something of value to the followers? Leadership should combine management know how with values and ethics. Moral considerations are both the beginning and the end of transformational leadership (Sergiovanni & Starratt, 1993).

Contrasting Leadership Theories

Blake and Mouton's Managerial Grid, McGregor's Theory X and Theory Y, and Burns' Transactional Leadership Theory and Transformational Leadership Theory are contrasted in the following ways: (1) The theories are organized in different ways. The McGregor and Burns leadership theories are divided into two separate main theories, whereas Blake and Mouton use a Grid to describe how different managerial styles dictate how people in leadership positions manage.

(2) The three theories deal with people in different ways. The McGregor's X and Y Theories are described by him as

two different leadership styles and one limits the teachers' authority. A leader under Theory X may be a close supervisor giving his/her teachers limited authority or respect. Under Theory Y the leader exhibits a positive orientation toward the teachers. Both Transactional and Transformational Leadership theories show positive respect from the leaders toward the individuals in the organization. As explained earlier in this chapter, a transaction takes place between leader and led for the purpose of exchanging something of value.

Transformational leadership provides incentives to the leader and led to improve their practices.

The Managerial Grid by Blake and Mouton (1978) also explains that sound problem solving and decision making in an organization will not succeed without open communication and without showing concern for the people in the organization. When high concern for people is coupled with high concern for production, the people strive enthusiastically to contribute to organizational purposes (Blake & Mouton, 1978).

(3) The three theories differ conceptually concerning the raising of leader and led to a higher sense of morality. Theory X does not believe that teachers can perform without leadership direction and encouragement; therefore, it does not see teachers being raised to a high level of morality. Theory Y focuses on fulfilling the needs of the worker and building respect between teacher and principal, but it does not discuss anyone moving to a higher level of morality.

The Managerial Grid does not deal with raising leader and led to higher levels of morality. It is concerned with how the organization uses hierarchy of management to achieve production with and through people.

Burns (1978) in his transformational leadership stated that his theory becomes active when leader and led engage with each other in such a way that leaders and followers raise one another to a higher level of motivation and morality.

After reviewing and contrasting these leadership theories, the researcher chose Burns' transactional and

transformational leadership theories to better inform the reader's understanding of the findings.

Open Issues on Instructional Leadership

As a result of the analytical review of literature it was found that there are several open issues which are important to investigate in relation to instructional leadership.

In Montessori education research is limited to a few quantitative studies about student academic and social successes in schools. There are no research studies specifically about Montessori administrators.

Preparation programs for school administrators are viewed as needing revision (Forsyth, 1992; Koerner, 1992; Stover, 1990; Polite, 1990; Hallinger & Murphy, 1991), and several researchers (Polite, 1990; Hallinger & Murphy, 1991; Playko, 1991; Sergiovanni, 1991; Stover, 1990; Duke, 1992; Heller, 1987; Vornberg, 1987; Smith, 1987; Schueckler, 1987) have suggested remedies to improve administrative preparation programs. A few Montessori administrators have voiced their

professional opinions about how Montessori administrators should be trained, but there are no research studies on Montessori administrators to back up these comments and suggestions. One principal said, "The philosophy must work to ensure the school's adherence to this philosophy" (Otis, 1992, p. 11). The present study identifies the actual Montessori instructional leadership practices of the principals as described by the Montessori teachers using a qualitative research design.

Research was reviewed on methods of assessing instructional leadership (Prickett, Richardson, Short, & Lane, 1990); however, this model by Prickett and others (1990) had questionable validity in identifying specific principal instructional leadership behaviors because it is undergoing evaluation to determine its effectiveness and validity. This model and other research in this area, including Tallerico and Blumberg (1991), only used one method of collecting data. In the present study internal validity was strengthened through triangulation (Goetz & LeCompte, 1984).

The literature review also emphasized and identified instructional leadership practices and options available to principals. The articles reviewed depended a great deal on expert opinions. The present qualitative research study included the practices of the principals as instructional leaders in Montessori schools as identified by Montessori teachers, which will add to the knowledge base about Montessori principals as instructional leaders.

Summary

The present study seeks to describe the instructional leadership practices of Montessori public school principals from the Montessori teachers' perspectives. Principals make a difference in the success of schools. Training in instructional leadership practices needs to become an important part of administrative preparation programs. Principals of Montessori public schools are expected to provide instructional leadership in the same measure as principals of regular public schools. However, the way Montessori principals meet these

expectations for instructional leadership, may vary due to the unique nature of their programs. Montessori programs are unique because they use the Montessori methods and philosophy to structure their teaching experiences.

Chapter III will include: (1) a description of the pilot study, (2) an overview of the research design, (3) a description of the participants and sites used for the study, (4) an overview used for the study, (5) an explanation of how the data were analyzed, and (6) a description of what procedures supported the validity and reliability of the study.

CHAPTER III
RESEARCH METHODS: DESIGN, DATA
COLLECTION, ANALYSIS

Qualitative Research Design

A qualitative design was chosen in order to gain an understanding of the Montessori teachers' perspectives of instructional leadership practices of public Montessori school principals. A pilot study was conducted in order to shape the research design and finalize the open-ended questionnaire.

Burns' transactional and transformational leadership theories have been used by the researcher to better inform the reader's understanding of the Montessori principals' instructional leadership practices as described by the Montessori teachers.

Pilot Study

The open-ended questionnaire used for this study was modeled after Blase's (1990) "The Teachers Work-Life Inventory" (TWLI). The TWLI and the IILPMP (Appendix A) were developed to gather data regarding the perceptions of teachers on a familiar topic. The researcher used "most frequent" and "most difficult" in the IILPMP because she wanted the teachers' perceptions on how their principals most often practiced instructional leadership and what areas of instructional leadership were the hardest for their principals to deal with. The first version of the IILPMP was inspected by a committee of four Montessori teachers from a local university, and they made no changes in the instrument. Next, a pilot study was performed which also helped to validate the questionnaire.

Goetz and LeCompte (1984) assert that prior field work and trial sessions are essential for correctly anticipating the variety of respondent's styles encountered in qualitative studies. Therefore, in preparation for the reported research in this study, a pilot study was conducted with nine private school

Montessori teachers in a midwestern metropolitan city. Nine Montessori teachers completed an open-ended questionnaire entitled the "Inventory of Instructional Leadership Practices of Montessori Principals" (IILPMP) devised by the researcher. After completing the IILPMP, they then evaluated the questions for clarity, ease of interpretation, and thoroughness. Principals at the three public Montessori schools involved in the study were asked to review the questionnaire and to offer suggestions for improvement. As a result of the principals' suggestions, the wording of the questionnaire changed from "describe what you think is your principal's most difficult problem" to "describe what you think is your principal's most difficult job (responsibility) as an instructional leader as related to the Montessori program." This was the only change to the questionnaire.

After the pilot IILPMP was administered to nine Montessori teachers, the answers were reviewed and the descriptive data were sorted into relevant topics. From the analysis, topics emerged which identified the instructional

leadership practices of the Montessori principals in their particular schools.

A focus group was selected from the teachers who responded to the questionnaires. This group consisted of four Montessori teachers who identified similar instructional leadership practices for their respective principals. The focus group met for a thirty minute semistructured interview, which was audio taped and transcribed. Field notes describing the physical and interpersonal contexts of the focus group were recorded. The transcribed interview of the focus group was analyzed for topics that identified instructional leadership practices of their Montessori principals. For example, during the pilot study the focus group talked about how important honesty is for principals. "Honesty" was included under the topic of communication. The field notes described where and when this group met, and that they were very relaxed because they did know each other.

Next, one teacher was selected and interviewed in order to clarify and expand on the teacher's answers on the

questionnaire. Gay's (1987) semistructured interview approach was followed. At the beginning of the interview, time was used to establish rapport and a trusting relationship between the interviewer and the teacher in order to get as much in-depth data as possible (Gay, 1987). The individual semistructured interview was audio taped and transcribed, providing practice in transcribing audio taped interviews. After the interviews, field notes describing the physical and social situation were recorded. The researcher noted where and when the interview took place. The transcribed interview was used to generate additional tentative topics that identified instructional leadership practices of the Montessori principal.

The pilot study was helpful in restructuring the wording of the open-ended questionnaire. It also provided an opportunity to practice interview skills and transcribe the audio taped interviews. "To enhance skill and dexterity in minimizing their own talk, many interviewers run the trial or pilot sessions" (Goetz & LeCompte, 1984, p. 129). The pilot study allowed the researcher the opportunity to practice minimizing her talk

during the interviews. The pilot study also provided practice in developing topics of instructional leadership practices of Montessori principals as described by the teachers through the open-ended questionnaires and interviews.

Overview of the Research Design

The pilot study prepared the researcher for the actual research study in which all Montessori teachers at three Montessori public schools were asked to respond to an open-ended questionnaire entitled the "Inventory of Instructional Leadership Practices of Montessori Principals" (IILPMP). A second method of data collecting involved a group of teachers at each school who formed focus groups for their particular school. The teachers who responded similarly to questions about their principals' practice of instructional leadership were invited to participate in a focus group at their school. The focus groups were organized in order to permit teachers to clarify and expand their answers to the IILPMP. The focus group semistructured interviews were audio taped and transcribed. The written

answers given by each of the teachers to the IILPMP were reviewed for clarity and content; and three teachers from Northern Montessori Elementary School, three teachers from the Southern Montessori Elementary School, and one teacher from the Central Montessori Elementary School were interviewed individually to allow the teachers to clarify and/or expand their responses to the initial open-ended questionnaire. The teachers chosen for the individual interviews were those whose responses were not clear or whose responses were extensive and covered a number of topics. The semistructured interviews were also audio taped and transcribed.

The descriptive data collected from the answers to the IILPMP, semistructured focus group interviews, and semistructured individual interviews were coded and the actual words were written under topics. When the findings were described in Chapter IV, the topics were found to fit under one of four major categories (communication techniques, shared responsibilities, preserving and supporting the Montessori program, and school procedures). The four major categories

have subcategories which help to describe the findings in more detail.

The remainder of this chapter describes the participants and site selection, data collection, data analysis, and criteria of validity and reliability.

Participant and Site Selection

In order to offer each teacher equal opportunity to participate in this study, all sixty-six Montessori teachers from the three public Montessori schools in the midwestern metropolitan city were invited to participate. The names of the schools, which are pseudonyms, are Central Montessori Elementary School (CMES), Southern Montessori Elementary School (SMES), and Northern Montessori Elementary School (NMES). The teachers at these schools were invited to participate because all three schools are well established Montessori schools, and the principals and teachers have the same Montessori certification or training and state teaching credentials. The public Montessori schools in this city have

three grades in each elementary classroom (pre-K to K or K, 1-3, and 4-6) and they extend from kindergarten through the sixth grade with the Montessori curriculum and concrete materials. This selection of schools provides a favorable setting for this study.

Data Collection

In this study three methods of collecting data were used. The use of three different kinds of data sources is one form of triangulation (Goetz & LeCompte 1984). More discussion about triangulation can be found later in this chapter under validity of the research design. The three methods used were: (1) an open-ended questionnaire entitled the "Inventory of Instructional Leadership Practices of Montessori Principals" (IILPMP), (2) semistructured focus group interviews, and (3) semistructured individual interviews.

The questionnaire. The IILPMP (Appendix A) was administered to fifty-four out of sixty-six Montessori teachers in the three Montessori public schools. As shown in Appendix A,

the first page of the IILPMP included the definition of "instructional leader." The IILPMP included the following questions: (1) Please describe what you think is your principal's MOST DIFFICULT job (responsibility) as an instructional leader as related to the Montessori program, describe the TYPICAL WAY your principal deals with this type of job (responsibility), GIVE AN EXAMPLE of how your principal deals with this type of job (responsibility), and RATE THE EFFECTIVENESS ("1" was low and "5" was high) of this method in dealing with this type of job (responsibility). (2) Please describe what you think is your principal's MOST FREQUENT job (responsibility) as an instructional leader as related to the Montessori program, describe the TYPICAL WAY your principal deals with this type of job (responsibility), GIVE AN EXAMPLE of how your principal deals with this type of job (responsibility), and RATE THE EFFECTIVENESS ("1" was low and "5" was high) of this method in dealing with the job (responsibility). Each question relies on a single idea which follows Goetz and

LeCompte (1984) guidelines for open-ended questions used in qualitative research.

Each time I went to a school to have the teachers fill out the questionnaires, I typed a set of field notes to help me remember what I did and what happened. For example, the following describes the situation at the SMES when the teachers filled out their questionnaires.

I arrived at 3:15 p.m. I visited with the principals for a few minutes before I went to the resource room where the teachers were attending a regular staff meeting followed by my questionnaire. I took photos, and by 3:45 p.m. most of the teachers had arrived. The principal introduced me. She asked the teachers who missed the staff meeting the week before to please fill out the permission form, if they were willing to participate. The letter of introduction about my research, and the permission forms were given out to all teachers present the week before. I had an agenda made out ahead of time: I thanked them for helping me and I made sure I had all the permission forms. I explained briefly what the project was about by referring to the letter they already had. I explained the "thank you" gift I brought for them, which was a twenty page Bloom's Taxonomy curriculum to be used by their students as independent work. This is a curriculum I developed to be used with the Montessori elementary cosmic curriculum. I explained that after I reviewed the questionnaires I would be asking them to meet one more time in a focus group or for an individual

interview, if they were willing. Finally, I went over the questionnaire, reminding them that their names would not be used. As the twenty-seven teachers started filling out their questionnaires, two teachers came up to ask questions. One teacher asked, "Will our principal be reading these?" I said, "No, only I will see them." Another teacher asked, "Can I reflect my answers using the Montessori principal I had before the present principal?" I said, "yes."

Several of the teachers were talking, and a couple of the teachers asked nicely if they would not do that. The principal, after about twenty-five minutes, asked if they could finish in five minutes? Most of them had finished by then and they brought me their questionnaires and picked up a copy of the Bloom's Taxonomy. One teacher asked if I could send him my disc so he could make the "Bloom's Command Cards" larger. I said I had a larger set at my office. If they wanted a larger set on card stock, it would cost five and one half cents per copy. I sent the information to the principal the next week, and several teachers ordered another set. I collected my things and left the room about 4:15 p.m.

This excerpt illustrates what happened at the SMES when the teachers filled out their IILPMP questionnaires.

The focus group interviews. The second method of collecting data consisted of audio taping and transcribing the entire focus group interviews. The focus group interview derives its name from the selection of groups which are

"focused" on a given topic (Lederman, 1990). Focus group interviews produce a very rich body of data because the information is expressed in the respondent's own words (Stewart & Shamdasani, 1991; Patton, 1990).

"The contemporary focus group interview generally involves eight to twelve individuals who discuss a particular topic under the direction of a moderator who promotes interaction and assures that the discussion remains on the topic of interest" (Stewart & Shamdasani, 1991, p. 10). A total of thirty teachers participated in five focus groups (CMES had seven teachers in one focus group; NMES had seven teachers in one focus group and three teachers in another focus group; SMES had five teachers in one focus group and eight teachers in another focus group). After the questionnaires were reviewed, questions were designed to probe more deeply, to collect more incidents, and to develop more diversity of dimensions under the topics which had emerged (Bogdan & Biklen, 1992). Each of the five focus groups discussed the topics which had emerged from the questionnaires.

The following is an example of a question and answer from the CMES focus group (Appendix D):

I said, "Under the following topic, which emerged from your responses to the IILPMP, of 'Instructional Leadership Practiced Through Clarifying and Educating Parents and Community About Our Montessori Program,' you wrote that, 'The teachers are encouraged to be involved in building and district meetings.'" I asked, "Are these meetings with all the elementary teachers in the district or with the other two Montessori schools?" A teacher responded: "It's interesting that you bring that up. The district is forming what they call 'curriculum councils' which involve all the elementary schools in the district. I went to the one on communication arts. We are going to be doing curriculum work that used to be done by curriculum supervisors, who are no longer working for the district" (Feb. 18 Focus Group p. 11 lines 118-123 CMES).

The following is an example of a question and answer from the NMES focus groups (Appendix E):

I said, "Under the following topic which emerged from your responses to the IILPMP, 'Instructional Leadership Practiced Through Dealing and Supporting a Diverse School Community,' a teacher wrote, 'Our principal supports each teacher as an individual, letting teachers develop their own style of teaching the Montessori curriculum.'" I asked, "Can someone explain in more detail how your principal supports each teacher as an individual?" A teacher responded: "He supports ideas, and even when there are liability issues, he still supports and helps like the trips to 'Camp Joy' for the

leadership training for students" (April 27 Focus Group A lines 11-19 NMES).

Here is an example of a question and answer from the SMES focus group:

I said, "Under the following topic which emerged from your responses to the IILPMP, 'Practicing Instructional Leadership Through Dealing with and Educating Parents, Community, and Downtown'," one teacher wrote, "The Montessori program is explained to the personnel at the central office." I asked, "Could someone or several of you comment on how you did this?" A teacher said, "The district was developing a new reading program. They had invested in several new reading texts. We didn't need the money invested in the reading text, we needed money invested in what we were working with . . . like the literature program . . ." (March 8 Focus Group A p. 9 lines 11-17 SMES).

Field notes were compiled by the researcher after the focus groups met and included the physical and interpersonal contexts which took place during the focus group interviews (Stewart & Shamdasani, 1991). Each of the five focus group interviews lasted from forty-five minutes to one hour, and they took twenty-five hours to transcribe.

The following is an example of the field notes I wrote after the focus groups met: On Monday, March 8, the principal saw me in the office of the SMES as I was signing in as a visitor at 3:00 p.m. The principal is always very friendly. She told me the focus group would

meet with me in the "doctor's office" (the name of the room where we were meeting). She had posted a note on a big message board in the office about where the teachers should meet me. Each member of the focus group had been sent a letter reminding him/her about our meeting, but not where the meeting would be. The "doctor's office" is to the right of the main entrance of the school and down the hall on the same level as the office. The janitor asked me, "How many chairs will you need?" That was at 3:15 p.m., and I needed eight chairs by 3:30 p.m. No problem—there were already five chairs in the room, so he brought four more. As I was waiting for the teachers, who usually had bus duty every day, three different teachers came into the room to ask if they could use the phone. I did tell them "yes," but, when the focus group came in, they would have to find another phone. The room had one rectangular table in the center of the room (20' by 14') and a desk at one end with a telephone on it. A bed for sick children was against one wall. The teachers arrived, I gave them a granola bar, which most of them ate as we informally visited before the interview started. The interview went very well, the teachers appeared relaxed and willing to be part of the discussion. The interview ended by 4:00 p.m.

The individual interviews. A third method of collecting data consisted of individual semistructured interviews with seven teachers from the three Montessori public schools (one teacher at the CMES, three teachers at the NMES, and three teachers at the SMES). Interviews provide data that arise in a natural or indigenous form because the individual respond

in their own words (Stewart & Shamdasani, 1991). The IILPMP responses were reviewed for clarity and content, and seven teachers were invited to expand on their initial responses to the IILPMP. Teachers were chosen if their responses were not clear or if their responses were extensive and covered a number of topics which allowed for the gathering of more detailed data. Each of these teachers was interviewed once for thirty to sixty minutes. These interviews explored the teachers' thoughts about their principals' practices as instructional leaders (Lederman, 1990). Following are three responses from the individual interviews.

One of the answers given by a teacher at the CMES on her questionnaire (Appendix G) was as follows: "Most frequent responsibility as an instructional leader has been discipline of both students and faculty. Building a program is no small thing. Students are learning to live in peace and work through cooperation. The faculty is learning to balance and modify great work loads and old habits. They also are beginning to look at the whole rather than individual parts." I asked this teacher during the individual interview, "Do you see the balance between great work loads and old habits as a result of Montessori responsibilities versus general expectations?" The teacher responded, "I think there is a tremendous load of work, planning takes a great deal of time. I realize that as you go through each

cycle for each grade level it gets easier, but until you have that built into your planning, it takes time" (Ind. Interview JNC p. 12 lines 123-127 CMES).

One of the answers given by a teacher at the NMES

(Appendix H) on her questionnaire was as follows:

"Our principal is not necessarily the chairperson of a convening group, but he is an active component of it always." I asked, "After he has thought out an answer, how does he communicate the results?" The teacher said, "My experience has been that he comes back to you, he does not communicate through memos" (March 11 Focus Group A p. 5 lines 17-21 NMES).

One of the answers given by a teacher at SMES (Appendix

I) was as follows:

"The most difficult job/responsibility for our principal is involving our parents of low achieving students to help with the job of training/educating their children." I asked this teacher, "Can you expand on this concern?" The teacher's response, "If one of us is having trouble, the child is not normalized, he/she can't choose work, the rules haven't sunk in. We need to contact the parent and be with them and see if the parent can help us. Often times we can't get a hold of the parent, the parents don't have phones, even have addresses. I'll phone and get a non-functioning phone. You can't direct your classroom and be on the telephone. Now Maria Montessori had a contract between her and the parent, we may need to initiate something like that" (Ind. Int. GAGS p. 4 lines 7-15 SMES).

The interviews were audio-taped and transcribed by the researcher. All of these interviews took a total of thirty-five hours to transcribe.

Each time I went to a school to give an individual interview, I took field notes and typed them as soon as possible in order to describe what I did and what happened. For example, following field notes were written during one of the individual interviews at NMES.

I arrived at NMES at 2:10 p.m.. I asked the secretary to phone the teacher I was interviewing today to see if I could come to her classroom. She asked me to meet her in her room. I went downstairs but couldn't find her room. A teacher took me to the correct area, which required walking through the cafeteria. The teacher being interviewed teaches in a very large open classroom with two other teachers with students ages nine to twelve. When I walked into the classroom, it was after school but there were several students all around the area working on projects. I did see one of the other teachers working with several students. I plugged the tape recorder in, and talked informally to the teacher for a few minutes. I tested the recorder and the extra microphone was not working, so I unplugged it and used the microphone in the unit itself. I finished the interview at 2:45 p.m.

In summary, three methods of collecting data were used. Fifty-four teachers at three public Montessori schools answered an open-ended questionnaire. On the questionnaires the teachers had identified the instructional leadership practices of their principals. Thirty teachers participated in five focus groups. These teachers responded to questions which probed more deeply into their answers on the original questionnaire. Each of the five focus groups discussed the general topics which had emerged as the researcher read through the questionnaires answered by the teachers. The third method of collecting data was individual interviews with seven teachers. These teachers expanded on their initial responses to the IILPMP.

Data Analysis and Interpretation

Constant comparative analysis was used for data analysis. "The constant comparative method is a research design for multidata sources, . . . the formal analysis begins early in the study and is nearly completed by the end of the data collection" (Bogdan & Biklen, 1992, p. 72). The researcher

started her formal analysis after reading the first set of questionnaires, which were given to the teachers at one of the Montessori schools, and continued through review of the transcriptions of the focus group interviews and individual interviews.

The researcher alone reviewed all the data through a line-by-line inspection of the Montessori teachers' responses to the open-ended questionnaires and transcriptions of the focus group and individual interviews. Bogdan and Biklen (1992) describe the process of "coding the information," as searching through the descriptive data collected from all sources for examples that will fit under different topics. The descriptive data may be recorded as phrases, sentences, or long exchanges between teachers. The only requirement is that the descriptive data be relevant to the particular identified topic (Stewart & Shamdasani, 1991). The descriptive data were listed under topics which had emerged from the data. When the findings were described in Chapter IV, the topics were brought together and put under one of four major categories by the researcher.

The categories have subcategories which help to describe the findings in more detail.

Table 1 shows examples from the NMES questionnaire responses and the topics which emerged from these responses.

Table 1: Exhibiting Progression from NMES Questionnaire Responses to the Emergent Topics

	Questionnaire Responses	Topics
1	"Listens to all sides"	Skilled communicator
2	"Everyone has a 'say' in decisions through the Building Committee"	Sharing decisions
3	"Possessing knowledge in Montessori instruction so teachers feel interaction leads to improvements"	Preserves and supports Montessori program
4	"Deals with students who can't conform to open environment"	Deals with discipline

As the questionnaires from the three schools were reviewed and responses were recorded, the responses were kept under the two separate divisions "Most Difficult" and "Most Frequent" jobs (responsibilities) of the principals. However, when the questions were being developed to be used during the focus group and individual interviews, it became clear that some of the teachers' responses worked best under "Most Difficult," whereas another teacher would see the same response fitting best under the division of "Most Frequent." The following is an example:

At the SMES one of the topics which emerged under both "Most Difficult" and "Most Frequent" was "parents." Under "Most Difficult" topic called "parents;" teacher #1 wrote, "dealing with parents;" teacher #5 wrote, "balance demands of parents and teachers;" and teacher #29 wrote, "dealing with parents who misunderstood Montessori philosophy." Under "Most Frequent" topic called "parents," teacher #4 wrote, "dealing with parents"; teacher #3 wrote, "educating parents about Montessori"; and teacher #27 wrote, "conveying Montessori to parents."

Therefore, these two separate divisions ("Most Difficult" and "Most Frequent") were not used during the focus group or

individual interviews, and data from the questionnaires were merged during the data analysis.

Table 2 shows examples from the NMES focus group and individual interview responses and the topics which emerged from these responses.

When describing the findings in Chapter IV, the final categories (communication techniques, shared responsibility, preserving and supporting the Montessori programs, and school procedures) encompass the topics for which the researcher had the most evidence. This evidence came from the open-ended questionnaires and transcribed focus group and individual interviews, and indicated how the teachers described their principals practicing instructional leadership (Bogdan & Biklen, 1992).

Table 2: Exhibiting Progression from NMES Focus Group and Individual Interviews Responses to Emergent Topics

	Focus Group & Individual Interview Responses	Topics
1	"Always follows-up with kids he has talked to"	Skilled communicator
2	"The Building Committee is not a threat to our principal"	Sharing decisions with teachers
3	"Provides information on Montessori needs to central office"	Montessori specific to preserve Montessori
4	"Ask students to write own plan"	Discipline
5	"Not political"	General information
6	"Available for discipline concerns"	Accessibility and availability

After reviewing several leadership theories, which are described in Chapter II, the researcher chose Burns' transactional and transformational leadership theories to better inform the reader's understanding of the findings. The Managerial Grid was not used because it identified a hierarchical emphasis for the leadership style involved and it did not include a move toward a higher level of morality for leader and led. The Theories X and Y were not used because Theory X does not respect the teachers as being able to take initiative and go beyond the status quo. Theory Y does involve a positive orientation of the workers but it does not show the leader and led working together to reach a higher level of morality.

The transactional and transformational leadership theories were chosen because they best fit the Montessori principals' instructional leadership practices as described by the teachers. As Burns (1978) states, the leaders' genius is shown in the way in which leaders value their followers. The Montessori principals practiced working with their staff and

parents in a supportive and respectful way. The principals encouraged teacher and parent involvement, input, and ideas for improving school practices. Transactional and transformational leadership theories work together to help the leaders and the led accomplish what they need to do to benefit the schools' environment. Sometimes the teachers gave examples of their Montessori principals practicing leadership skills which represented transactional leadership because the principal and the teachers or parents exchanged something of value. For example, in the Montessori schools used in this study the principals trained parents about the Montessori philosophy in exchange for the parents' involvement in their childrens' education. Under transformational leadership, the principals and the teachers integrated the Montessori language/arts curriculum with the district's curriculum which raised the principal and teachers to a higher level of motivation and morality. Chapter IV describes how the transactional and transformational leadership theories are practiced by the principals at the Montessori schools according to the teachers.

Validity and Reliability in Qualitative Research

To support the validity and reliability of the research, several procedures were followed. Criteria for the soundness of the research is supported by including the procedures described below.

External and Internal Validity in Qualitative Research

External validity, drawing on Goetz & LeCompte (1984), refers to the degree to which a real life experience can be compared legitimately across groups. "This problem is addressed to an extent by multisite qualitative designs. The increase in size of selection from one to several supports a study's generalizability" (Goetz & LeCompte, 1984, p. 229). Montessori teachers from three Montessori public schools were invited to participate during the course of the investigation.

"Internal validity refers to the extent to which scientific observations and measurements are authentic representations of some reality" (Goetz & LeCompte, 1984, p. 210). Goetz and

LeCompte (1984) state that internal validity can be satisfied by triangulation. "Triangulation prevents the investigator from accepting too readily the validity of the initial impressions; it enhances the scope, density, and clarity of constructs developed during the course of the investigation" (Goetz & LeCompte, 1984, p. 11). One form of triangulation is the use of three different kinds of data sources. Triangulation occurred in this study by collecting data from the open-ended questionnaire, focus group interviews, and individual interviews.

Kirk and Miller (1989) assert that if it can be shown that the data generated by an alternative procedure supports the initial data, then the case for internal validity is strengthened. The data from the individual and focus group interviews supported and clarified the data from the questionnaire (IILPMP).

In Chapter IV, the findings, including examples from each school, proceed in subsequent sections starting with the responses from the questionnaires, then the focus groups, and finally from the individual interviews. This renders an increasingly specific understanding of the instructional

leadership practices of Montessori principals from the teachers' perspectives.

Internal validity was also strengthened by including three teachers who performed a "member check." Lincoln and Guba (1985) use the word "credibility" as the naturalist's equivalents of the conventional term "internal validity." "The member check, whereby data, analytic categories, interpretation, and conclusions are tested with members of those stakeholder groups from whom the data were originally collected, is the most crucial technique for establishing credibility" (Lincoln & Guba, 1985, p. 314). Member checks were conducted by the researcher after the interpretation of the data were written. The investigator arranged a session with a teacher from each of the three schools. The teachers had responded to the questionnaire; two had been members of a focus group at their schools; and one had been individually interviewed. The teachers were shown and asked to discuss the research design, analysis, interpretation, and findings. The three teachers all expressed how they agreed with the

interpretations and conclusions, which were drawn directly from the teachers who participated in this study. They also expressed that the results were accurate and clear.

Lastly, throughout the findings, the actual words of the teachers are quoted. Verbatim conversations and direct quotations from the participants constitute the principal evidence for assessing the internal validity of a qualitative research report (Goetz & LeCompte, 1984).

External and Internal Reliability in Qualitative Research

"External reliability addresses the issue of whether independent researchers would discover the same phenomena or generate the same constructs in the same or similar settings" (Goetz & LeCompte, 1984, p.210). If another researcher replicated the study at these three Montessori schools or at three similar Montessori schools, would he/she generate the same topics, categories, and written findings as this report does? "Replicability is impossible without precise

identification and thorough description of the strategies used to collect data" (Goetz & LeCompte, 1984, p. 217); therefore, four major reliability concerns were addressed. Goetz and LeCompte (1984) argue that external reliability of the data is enhanced if the qualitative researcher recognizes and addresses through a written explanation the four major reliability concerns: researcher status position, participants (teachers), social situations and conditions, and methods of data collection and analysis. By providing such a written explanation, other researchers are in a better position to discover the same phenomena or generate the same constructs in the same or similar settings.

The first reliability concern is the researcher's status position. The researcher's status position in this study was one of an outside observer. The researcher was new to the area but met with each principal, talked several times to each principal over the phone, and wrote several letters to him/her about this research project. A letter of introduction describing the research project was also sent to each teacher at the three

Montessori public schools. In order to encourage participation in this project, each teacher was offered a special gift of educational materials. The researcher did not know or meet the teachers who participated in the study except a few who had interns in their classrooms. The researcher supervises elementary Montessori interns in this and several other public school districts in this area. The researcher was also able to work with the three Montessori principals during a week-end retreat for all the public Montessori principals from the United States. These principals were part of a group formulating the general requirements and policies for all public Montessori schools. This was an opportunity for the researcher and principals in this study to become better acquainted.

External reliability requires careful delineation of the sampling used in the research (Goetz & LeCompte, 1984). The sampling in this research included an invitation to all sixty-six teachers at the three Montessori public schools in a metropolitan city because it has well-established Montessori schools. Fifty-four teachers volunteered to participate in the

questionnaire portion of the research, thirty participated in the focus group interviews, and seven in the individual interviews.

A third element influencing the external reliability of the data collected is the social situation from which they are gathered (Goetz & LeCompte, 1984). The physical and interpersonal contexts within which the data were gathered are delineated and recorded in the field notes, thereby enhancing the possibility that an independent researcher could follow the procedures and discover the same constructs in a similar setting. After the questionnaires were answered and the audio taped focus group or individual interviews were completed, field notes describing the physical environment and the interpersonal contexts of the specific situations were recorded by the researcher.

The fourth concern in establishing external reliability requires explicit descriptions of the strategies and techniques used to collect and analyze the data. The process of developing the questionnaire, and the guiding questions which were used during the focus groups (Appendix D-CMES, Appendix E-NMES,

Appendix F-SMES) and the Individual Interviews (Appendix G-CMES, Appendix H-NMES, Appendix I-SMES) at each of the three schools are thoroughly described in this chapter and in the appendices listed in this paragraph.

All interviews followed Gay's (1987) semistructured approach which involved asking structured questions followed by an informal discussion. Time was used to establish rapport between the teachers and the researcher. The interviews were audio taped, and transcribed by the researcher.

The data analysis processes are also described. "Because (external) reliability depends on the potential for subsequent researchers to reconstruct original analytic strategies, only those accounts that specify these in sufficient detail are replicable" (Goetz & LeCompte, 1984, p. 217). The constant comparative analysis method, which was used for this study, is described earlier in this chapter. Table 1 and Table 2 also show examples of the questionnaire, focus group, and individual interview responses, and which topics emerged from the data as it was reviewed by the researcher.

"Internal reliability refers to the degree to which other researchers, given a set of previously generated constructs, would match them with data in the same way as did the original researcher" (Goetz & LeCompte, 1984, p. 210). All the categories developed from the data collected and the processes used throughout the study have been recorded and saved. The field notes, the tape recordings, the transcripts of all the interviews, and the copies of the open-ended questionnaires are all available for future scholarly re-analysis. Data collection that relies on tape recordings strengthens the internal reliability of results (Goetz & LeCompte, 1984).

The analysis process also permitted similarities between the three sites to emerge which contributed to internal reliability (Goetz & LeCompte, 1984).

Internal reliability was also strengthened by including a peer debriefing session, which was conducted after the data had been gathered and interpreted. "Peer debriefing is a process of exposing oneself to a disinterested peer in a manner paralleling an analytic session and for the purpose of exploring aspects of

the inquiry. The inquirer's biases are probed, meanings explored, and the basis for interpretations clarified" (Lincoln & Guba, 1985, p. 308). The researcher met with a person who has been the teaching associate and research assistant for a professor. The professor teaches the qualitative research classes at a large university in a midwestern metropolitan city. For several hours the researcher and the peer debriefer went through all the actual questionnaires, interview transcripts, and written materials including the interpretations for the entire research process. This meeting took place from 1:00 p.m. until 5:00 p.m. on March 28 at the office of the peer debriefer. The debriefer probed the methodological, legal, and substantive aspects of the paper with the researcher. The peer debriefer approved of the methods used, legal procedures which were followed to gain entry and protect the participants, and the way the researcher gathered and interpreted the data which resulted in the findings.

1. The researcher was not a member of the community.

1. The researcher was not a member of the community.

Summary

A qualitative design was used to gain an understanding of the Montessori teachers' perspectives of the instructional leadership practices of public Montessori school principals. The data were collected by using an open-ended questionnaire (IILPMP), semistructured individual interviews, and semistructured focus group interviews, which represent an example of triangulation of the data collection methods (Goetz & LeCompte, 1984).

A pilot study was conducted with several Montessori teachers in a midwestern metropolitan city. The pilot study offered practice for each procedure that was used for this research project and helped finalize the open-ended questionnaire. After the teachers completed the IILPMP they were asked to evaluate the questionnaire for clarity. Changes were made to the IILPMP as a result of their recommendations. A teacher from this group was interviewed to expand on the original answers to her questionnaire. Four of these teachers were included in a focus group because the answers on their

questionnaires were similar. The focus group members were interviewed. Both the individual interview and focus group interview were transcribed, and the data from these transcriptions were placed into descriptive categories.

For the actual study, the questionnaire was completed by a total of fifty-four out of sixty-six Montessori public school teachers from three different urban schools in a midwestern metropolitan city. The IILPMP responses at each of the three schools were reviewed and questions for the semistructured interviews were developed which allowed several teachers to expand on their answers. Some teachers were involved in an interview as a member of a focus group; others were interviewed individually. Of the fifty-four teachers who responded to the questionnaires, the five focus groups involved a total of thirty teachers, and the individual interviews involved a total of seven teachers from the three different schools. The constant comparative method (Bogdan & Biklen, 1992) of data analysis was used for this study, which resulted in analysis beginning early in the study.

The researcher alone coded all the data through a line-by-line inspection of the Montessori teachers' responses to the questionnaires and transcriptions of the individual and focus group interviews. In so doing descriptive data were placed under a number of relevant topics. The topics were reviewed and placed under four major categories.

Member checks (Lincoln & Guba, 1985) with three teachers, one from each school, were conducted in order to discuss the design, analysis, interpretation, and findings of the research. The teachers expressed that the results were accurate and clear.

A peer debriefing was also conducted with a qualitative researcher from a local university. The peer debriefer reviewed the methods, legal aspects, and substantive qualities of the research.

External validity refers to the degree to which a real life experience can be compared legitimately across groups. This was addressed to an extent by the multi-site selection. The

Increase in size of selection from one to several supports a study's generalizability (Goetz & LeCompte, 1984).

The internal validity criterion was strengthened through triangulation (Goetz & LeCompte, 1984) by using three methods of collecting data, through member checking (Lincoln & Guba, 1985), and through verbatim accounts of participants' words and voices (Goetz & LeCompte, 1984).

External reliability was enhanced as the researcher addressed the four major reliability concerns (Goetz & LeCompte, 1984): description of the researcher's status position, description of the teachers, description of the social situation and conditions, and description of the methods used for data collection and analysis.

Internal reliability, which refers to the degree to which other researchers would match the generated constructs with the data in the same way as did the original researcher (Goetz & LeCompte, 1984), was enhanced by recording and saving all the data collected throughout the study. The analysis process also permitted similarities between the three sites to emerge which

contributed to internal reliability (Goetz & LeCompte, 1984). Peer debriefing (Lincoln & Guba, 1985) also strengthened the internal reliability.

In Chapter IV the findings will be described. These findings are supported through teachers' responses on the questionnaires and during the interviews as to what were the most frequent and/or most difficult job (responsibilities) practiced by their principals as instructional leaders. Also in Chapter IV, the findings are interpreted by drawing on the theories of transactional leadership and transformational leadership (Burns, 1978).

CHAPTER IV

FINDINGS

This study describes Montessori principals' instructional leadership practices from teachers' perspectives. In this chapter, vignettes of the social situations of the interview process are described. The findings are described and linked to the theories of transactional leadership and transformational leadership (Burns, 1978).

By reviewing the teachers' responses from all the data sources to what were the most frequent or most difficult jobs (responsibilities) practiced by their principals as instructional leaders, the descriptive data were coded and listed under topics. The topics were brought together and put under one of four major categories by the researcher. The categories have subcategories which help to describe the findings in more detail. The following categories and subcategories emerged from the data analysis: (1) communication techniques including

(a) communicate openly, calmly, clearly, and fairly with a varied school community, (b) build consensus through communication, and (c) practice public relations through communication; (2) shared responsibilities including (a) principal sharing responsibilities with teachers and (b) principal sharing responsibilities with parents; (3) preserving and supporting the Montessori program including (a) understanding the dynamics of the Montessori program, (b) blending Montessori curriculum with public school curriculum, (c) having what is needed for Montessori programs and mobilizing help to get these things, (d) supporting the Montessori report card committee, (e) preserving the Montessori program by educating parents, (f) assisting and supporting Montessori students, and (g) modeling the Montessori philosophy; and (4) school procedures including (a) providing support services for students and (b) providing student directed discipline and clear school discipline procedure.

In this chapter the vignettes of the social situations of the interview process are described. Transactional leadership

and transformational leadership theories are then discussed and linked to the four major categories and subcategories. Findings will proceed in subsequent sections starting with the responses from the questionnaires, then the focus groups, and finally from the individual interviews. This will render an increasingly specific understanding of the instructional leadership practices of Montessori principals from the teachers' perspectives.

The theories of transactional leadership and transformational leadership were used to better inform the reader's understanding of the findings. After each category is discussed, if there was an exchange of valued things (Burns, 1978), these exchanges are described as examples of how transactional leadership informed the researcher's understanding of the practices of instructional leadership. If the principal and teacher are raised to a higher level of motivation and morality (Burns, 1978), then examples are used in order to show how transformational leadership guided the analysis.

Natural Settings: Examples of the Focus
Group and Individual Interviews

Focus Group Interview Vignettes

All of the teachers involved in the five focus groups were invited to participate. If they accepted the invitation, they were sent another letter that identified the day and time of the focus group meetings, which had been approved by the principals. The following are examples of how the focus group meetings went. The researcher abstracted this information from her field notes.

On Thursday, February 18, seven faculty members met for a focus group interview at 8:45 a.m. at CMES. Earlier I had plugged the tape player in to make certain it would work. At first it worked, but then the microphone stopped working. It was upsetting to me, but one of the teachers offered to get a player out of her room, which she did. We were at one long table in the school's library. I asked the teachers to talk as loud as they could or move closer to the recorder since this machine did not have an adequate microphone for picking up voices from a distance. Some of them seemed to talk with plenty of volume. I assured them again that their names would not be used in the final report. Because of the recorder problem, there were only twenty-five minutes to complete the interview. The teachers are always very busy, on a tight schedule, and I told them they would be out in time to go to their rooms at their scheduled time. One teacher did leave five minutes before the others. They seemed relaxed. Only one teacher did not respond to any of the questions. At the end I did

express my appreciation for their willingness to participate.

On April 27, I arrived at 2:00 p.m. at NMES. The secretary, who was very friendly, asked me with whom I would be meeting so she could call them from their classrooms. I saw one teacher who was in this focus group, and since we met in his room the last time, I asked if we could meet in his room again.

This is actually the second time I have met with this group. The first time I met with this group, the tape player recorded the talk before the interview started, which was my way of testing the recorder, but it did not record the actual interview. I wrote the teachers another letter to ask them if they would be willing to do the interview over, and all but one was able to come. After the interview session on that day, the teachers explained that the reason they were willing to do it over was because I was so interested and sincere about the project, and they wanted to talk about their principal, who they think is terrific.

The interview started at 2:20 p.m. and finished at 2:50 p.m., but four of the teachers kept talking so we went on until 3:05 p.m.. This was a very enthusiastic group. They were relaxed and willing to share during the interview.

The social situations for the five focus group interviews were all different, but two examples have been described above to contextualize the study for the reader.

Individual Interview Vignettes

Seven teachers had been contacted about participating in the individual interviews. They all agreed, which pleased me

very much. I made arrangements to meet them at their convenience.

On February 8, I sent the SMES vice principal a letter requesting help in setting up three individual teacher interviews. One teacher phoned me February 12 about meeting with her after school the same day. The following is a vignette of what went on during this interview.

We met in the office, and then we went to a room on the first floor of this very large urban public Montessori school. She suggested the space. Someone was on the phone in this room. While we waited, she asked if she could read over her questionnaire. I let her, but it made the interview a little more difficult for me because my questions were planned to address what she had written. I wanted her to respond to my questions, not what she had just looked at. At the end of the interview to help express my appreciation, I gave her a box of Valentine candy since it was Valentine Party day.

Below is a vignette of an individual interview held at the CMES.

March 5, Friday, I arrived in the office area of the CMES at 8:20 a.m. While waiting for the teacher I was going to interview, I read over the questions I had prepared. I arrived twenty-five minutes early, but it was snowing so I gave myself extra time to travel. It takes about one hour to arrive at this school from my

house. While waiting, the principal came in. I was scheduled to interview and shadow her earlier that week, but the school was closed because of snow. I rescheduled the interview with her.

At 8:40 a.m. the teacher phoned from her room and invited me down. She is a very nice person and easy to talk to. After taking a photo of her room, we sat at one of the children's desk. I plugged in the tape player. The conversation started with an informal discussion about the weather. Then after testing the recorder the interview started at 8:47 a.m. Her room is in the basement of this large urban elementary school. She does have windows on one wall, and shelves on the other three walls filled with Montessori materials and books. The student desks are placed on the outside of the room in a semi-circle and the teacher's desk is on a separate wall. This creates a large floor area for the students. The interview was finished at 9:15 am, and I thanked her for participating.

The social situations for the seven individual interviews were all different, but the above examples provide some insight into the individual interview situations.

James MacGregor Burns: Transactional and Transformational Leadership Theory

Burns (1978, p. 19) defined leadership as "leaders inducing followers to act for certain goals that represent the values and the motivations of both leaders and followers." The leaders' genius is shown in the way in which leaders valued

their followers. The interactions between the leaders and the followers take two fundamentally different forms, which Burns (1978) calls transactional leadership and transformative leadership.

Transactional Leadership

Burns (1978) described transactional leadership occurring when one person makes contact with others for the purpose of exchanging something of value, whether economic or political or psychological in nature. Most often it engenders short-lived relationships and the leader and led move on to other interactions. Although he recognizes it as a transitory leadership engagement, he concedes it has a useful, legitimate function for those individuals involved in the transaction.

In the field of educational leadership Leithwood (1992) writes that transactional leadership practices are central to maintaining the organization by getting the day-to-day routines carried out. According to Sergiovanni (1990) there are four stages of leadership for school improvement. These are

bartering, building, bonding, and banking. Sergiovanni (1990) connects his "leadership by bartering" with Burns' transactional leadership (the leaders and followers matching needs with services in order to accomplish independent objectives). For example, followers may receive merit pay in exchange for increased performance, positive reinforcement in exchange for good work, and/or a feeling of belonging in exchange for cooperation.

Sergiovanni and Starratt (1993) identified transactional leadership in school settings as frequently involving an exchange of favor between leader and follower. These transactions are governed by instrumental values such as fairness, honesty, loyalty, integrity. People are seeking their own individual interest.

More discussion on this topic can be found in Chapter II.

Transformational Leadership

"Transforming leadership occurs when one or more persons engage with others in such a way that leaders and

followers raise one another to higher levels of motivation and morality" (Burns, 1978, p. 20). The goals of leader and led might start out as separate but related, as in the case of transactional leadership, and only later become fused. Transforming leadership raises the level of human conduct and ethical aspiration of both leaders and led, thus having a transforming effect on both (Burns, 1978). The leader is more capable of evaluating the motives of a follower and the leader takes the initiative in making leader-led connections even in respect to communication and exchanges which may take place. The leaders take care of the followers' wants and needs, as well as their own, and thus serve to change the makeup of the followers' motive base through gratifying their motives (Burns, 1978). Transforming leadership can excite the previously bored and apathetic, and can recreate a political connection with the alienated.

Leithwood (1992) suggests that transformational school leaders provide the necessary incentives for individuals to attempt improvements in their practices. Leithwood (1991)

suggests further that transformational school leaders are in pursuit of three goals: (1) helping school personnel develop and maintain a collaborative, professional school culture by allowing staff members to plan together, by giving teachers shared power and responsibilities; (2) fostering teacher development by encouraging them to set goals for professional growth, and establishing a school mission; (3) improving group problem solving by keeping the group on task, facilitating open discussion, avoiding preconceived solutions, actively listening, and summarizing information at the end of the meeting. These leaders shared a genuine belief that their staff members as a group could develop better solutions than the principal could alone (Leithwood, 1992).

Under his four stages of leadership for school improvement, Sergiovanni compares his "leadership by building" and "leadership for bonding" or "valued-added leadership" to Burns' transformative leadership. Initially transformative leadership takes the form of "leadership by building" since the focus is on arousing human potential, and both leader and

follower are motivated to a higher level of commitment and performance. Finally, transformative leadership takes the form of "leadership by bonding" when leadership becomes moral because it raises the level of ethical conduct of both leader and led, thus transforming both.

Sergiovanni and Starratt (1993) explain that transformational leadership in schools involves an exchange among people seeking common goals which call people's attention to the basic purposes of the organization. "Transformational leadership changes people's attitudes, values, and beliefs from being self-centered to being higher and more altruistic" (Sergiovanni & Starratt, 1993, p. 187). Transformational leaders are inspirational, intellectually stimulating, and considerate of individuals.

Further information on transformational leadership can be located in Chapter II.

Montessori Elementary School Findings
Questionnaires, Focus Group,
and Individual Interviews

By reviewing the teachers' responses to the three methods of collecting the data, the following general categories were identified by the researcher as instructional leadership practices of Montessori principals: (1) communication techniques, (2) shared responsibilities, (3) preserving and supporting the Montessori program, and (4) school procedures.

Under the category of "communication" the teachers responded that their principals as instructional leaders were able to: (1) communicate openly, calmly, clearly, and fairly with a varied school community (varied because the teachers come from many different Montessori training programs and the children come from different socio-economic classes), (2) build consensus, and (3) practice public relations through communication.

Under the category of "sharing responsibilities" the teachers expressed that their principals practiced instructional leadership by: (1) sharing responsibilities with the teachers by

supporting "The Building Committee," sharing observations between classrooms, and approving the student leadership camp; and (2) sharing responsibilities with the parents.

In the category of "preserving and supporting the Montessori program," the teachers wrote that the principals practiced instructional leadership in the areas of: (1) understanding the dynamics of the Montessori program, (2) blending the Montessori curriculum with the public school curriculum, (3) having what is needed for the Montessori programs and mobilizing help to get these things, (4) supporting the Montessori report card committee, (5) preserving the Montessori program by educating parents, (6) assisting and supporting Montessori students, and (7) modeling the Montessori philosophy.

Under the category of "school procedures" the teachers' responses suggested the following principal practices: (1) providing support services for students, and (2) providing student directed discipline and clear school discipline procedures.

In the following sections the findings will be presented under each category with subcategories describing first the findings from the questionnaires, then the focus groups, and finally the individual interviews. This renders an increasingly specific understanding of the instructional leadership practices of Montessori principals from the teachers' perspectives. The theories of transactional leadership and transformational leadership (Burns, 1978) were used to better inform the reader's understanding of the Montessori principals practices of instructional leadership as described by the Montessori teachers.

Communication Techniques

The research question concerned the practices that Montessori principals utilize when responding to their most frequent and/or most difficult instructional leadership job/responsibility in Montessori public schools. As described earlier in Chapter III, the two separate divisions of "Most Difficult" and "Most Frequent," which were on the

questionnaires, were merged during the data analysis. The instructional leadership practices of Montessori public school principals, which emerged from the three sources of data and were labeled by the researcher, includes the category of communication techniques. The teachers voiced that their principals were able to: (1) communicate openly, calmly, clearly, and fairly with a varied school community, (2) build consensus, and (3) practice public relations through communication.

Open, fair, clear, and calm communication. The principals were described as using calm and clear communication techniques with a varied school community of parents, staff, and students. At these schools the teachers received their Montessori certificates from different Montessori training programs, and the parents and students were also from a wide range of different socio-economic classes; therefore, the teachers in this study referred to their community as "diverse" or varied. The teachers included the

ability of the principals to listen as an important part of communication.

The teachers recorded on their questionnaires that, "Our principal is an open and clear communicator" (Feb. 22 IILPMP #1 p. 2 lines 1-6 NMES). Another teacher recorded, "Our principal communicates between teachers, parents, students, and downtown personnel calmly and fairly so everyone feels they were heard and treated equally" (Jan. 25 IILPMP #12 p. 2 lines 1-6 SMES). As an example of thinking through a discussion, a teacher wrote, "Our principal leads groups, listens, synthesizes, and the group comes out of the meeting feeling they participated in coming to a fair decision" (Feb. 22 IILPMP #1 p. 2 lines 6-15 NMES).

During the focus group interviews the teachers also discussed how the principals used clear and calm communication practices, which the teachers identified as one of the principals' most frequent and/or most difficult instructional leadership practices. One teacher said, "Our principal is a clear communicator... at the end (of a

discussion) when he is asked to give his opinion it is more like a summary. He's able to listen to each of us . . . he doesn't talk for us . . ." (April 27 Focus Group A p. 26-27 lines 112-129 NMES).

During an individual interview, a teacher expressed that his principal had good listening skills and was a good communicator who wanted input from members of the staff. He said, "My principal is a good listener, which is important in order to be a good communicator. You have to be able to listen to the other person to know what they really want. Good administrators . . . are people looking for input, willing to delegate responsibility to others, and willing to listen" (Feb. 18 DGS p. 10 lines 113-124 SMES).

Builds consensus through communication. The principals as instructional leaders supported different views and molded a consensus based on the Montessori philosophy. The principals showed respect and took the time to understand their teachers.

A teacher reported on the questionnaire, "Our principal listens to all sides . . . he works to draw all factions together. . . people are happy with the final outcome" (Feb. 22 IILPMP #7 p.

2 lines 5-11 NMES). The principals worked at involving everyone in decision making so a consensus could result. In another school, a teacher wrote on a questionnaire, "When a child has a serious problem, our principal calls everyone together and listens to everyone including parents, teachers, and students" (Jan. 25 IILPMP #20 p. 2 lines 1-6, 18-20, SMES). The principals practiced eliminating possible misinformation by, as one teacher wrote ". . . gathering advice and opinions from others" (Jan. 25 IILPMP #6 p. 3 lines 1-5, 9-13 SMES) and meeting with everyone involved with the situation.

During the focus group interviews the teachers were asked if they had an example of their principal supporting them through building consensus and through communication. This was a topic which emerged from the questionnaires as illustrating how their principal practiced instructional leadership. During the focus group interview one teacher explained that "a fourth grader had trouble adjusting to her classroom, and the principal pulled everyone together so a solution could be discussed. We (student, teacher, and principal)

decided on a plan (which was the student's idea), read it over . . . we're going to check it later and help her adjust" (April 27 Focus Group A p. 23-24 lines 53-62 NMES). (Note--In Montessori schools students stay in the same room with the same teachers for three years--3 to 6, 6 to 9, 9 to 12 years old. Therefore, fourth grade is a transition year.)

Building a consensus also involved having a follow up procedure so the teachers felt their principal's support. During a focus group interview one of the teachers expressed "he always, always follows-up (with kids he has talked to) with a meeting with the three of us (teacher, student, principal) to put closure to the situation" (April 27 Focus Group A p. 24-25 lines 79-84 NMES).

Practicing public relations through communication. The teachers were asked what practices Montessori principals engage in when responding to their most difficult and/or frequent instructional leadership job/responsibility. One of the subcategories which resulted from the teachers' explanations is

that Montessori principals practice public relations through communication and accessibility.

As expressed by the teachers, the principals were very involved with public relations at the schools and throughout the community. Because the Montessori method of education is new to many people, the teachers expressed that their principals were constantly talking about the program. A teacher wrote on a questionnaire, "Our principal relays information to others who have questions about our Montessori schools . . . (she) also acts as a public relations spokesperson." This teacher went on to write, "Our principal . . . spends time on the phone and with parents . . . (which is an) important part of public relations" (Jan. 27 IILPMP #8 p. 2 lines 12-18 CMES). During a focus group interview a teacher explained how public relations in their Montessori school can involve explaining what the Montessori school is. The teacher said, "Sometimes it takes a lot of public relations because we are looked at as an elite group." This teacher went on to state, "It takes a lot of experience and Montessori knowledge to be able to talk to the press . . . to

parents (about the fact that) we are a public Montessori school” (March 8 Focus Group B p. 28 lines 324–328).

Practicing public relations as an instructional leader was also voiced by a teacher to include communicating the success of the Montessori program to the central office. During an individual interview a teacher commented, “A good principal enlightens the school district about the Montessori program . . . our principal is a good communicator with the school district” (Feb. 18 DGS p. 5 lines 18–25 SMES).

Linking communication techniques with transactional leadership and transformational leadership theory.

Transactional leadership and transformational leadership complement each other (Leithwood, 1992). Under the category of communication techniques, the Montessori teachers explained how their principals practiced instructional leadership. The theories of transactional leadership and transformational leadership theories have been used by the researcher to inform the reader’s understanding of the Montessori principals instructional leadership practices as identified by the teachers.

The Montessori principals, through their communication techniques, practiced transactional leadership by taking the initiative in making contact with others, such as teachers or parents, for the purpose of an exchange of valued things (Burns, 1978). As an example of transactional leadership, the teachers explained that the principals practiced public relations by talking to the parents, the media, and others in the community about the Montessori method of education. The principals, because of their Montessori training and experience, were able to explain the Montessori philosophy to any interested person. As instructional leaders, the teachers described their principals as spending important time serving as public relations' spokesperson. Consequently, many new parents sent their children to the Montessori schools. In return, the parents became advocates of the Montessori schools. The teachers also described how the parents, who now understand the program, are much easier to work with and more involved with their children's education. The exchange of a valued thing (Burns, 1978) included the principals serving as public relation persons

by teaching new parents about the Montessori method, and, in return, the parents became advocates of the Montessori schools and became more involved with their children's education.

Transformational leadership, where the leaders and followers raise one another to higher levels of motivation and morality (Burns, 1978), was also practiced by the Montessori principals under the category of communication techniques. The teachers said that the Montessori principals supported different views and allowed the teachers to voice their opinions about school concerns. Consensus between teachers and principals results from these open discussions. Leithwood (1992) says that transformational school leaders are in continuous pursuit of improving group problem solving by allowing open discussions. The teachers felt elevated and valued when their principal wanted and listened to their input and ideas. Many of these teachers had experienced principals in other schools who would not let the teachers express their ideas because it seemed to threaten the principals' power. The teachers felt important and part of the process of initiating new ideas. The

principals accepted and instituted their ideas. Motivation and morality are elevated when unity in an organization strengthens the school's program, which ultimately benefits the students. As a result of seeing the school's program strengthened toward something that is good for the students and society, both the leader and follower are motivated to a higher level of commitment and morality because it raises the level of ethical conduct of both leader and led (Sergiovanni, 1990).

Summary of communication techniques. The teachers reported that communication techniques were practiced by the Montessori principals as instructional leaders. The principals communicated calmly and clearly to the entire school community, which included the parents, staff, and parents. This allowed everyone involved to feel they were communicated with fairly and treated equally. The teachers also observed that their principals built consensus between those involved by discussing concerns and problems at the schools. Finally, communication techniques practiced by the principals resulted in good public

relations with parents, community members, and the school district personnel.

Transactional leadership was practiced by the Montessori principals when they communicated and took the initiative in making contact with others for the purpose of exchanging valued things (Burns, 1978). Such an exchange was exemplified when principals informed new parents about the Montessori method. In return, the parents became advocates of the Montessori schools and became more involved with their children's education.

Transformational leadership was practiced by the Montessori principals when they used effective communication for the purpose of raising the leaders and followers to a higher level of motivation and morality (Burns, 1978). The teachers felt elevated and valued when their principal requested their input and ideas. Both principals and teachers reached a higher level of morality and motivation when their work together resulted in improvement of the school's program which, in return, benefited the students.

Shared Responsibilities

The Montessori teachers were asked what practices the principals engaged in when the principals practiced instructional leadership. The teachers said their principals shared responsibilities. The category included two subcategories: (1) principals sharing responsibilities with the teachers to include supporting "The Building Committee," sharing observations between classrooms, and approving the student leadership camp; and (2) principals sharing responsibilities with the parents.

Principal sharing responsibilities with the teachers.

The teachers reported that their principals allowed and encouraged the teachers to be an active part of the decision making process of the schools. The principals asked the teachers to develop their own ideas and take initiative for making decisions. The principals also supported the ideas and initiatives which the teachers took in their team meetings and other times. In each school the teachers at each level (3 to 6, 6

to 9, or 9 to 12 years old) met in their team meetings on a regular basis to discuss their ideas and concerns.

The teachers also said that the principals practiced instructional leadership by supporting "The Building Committee" (TBC), by sharing observations between classrooms for parents and others, and by approving the student leadership camp planned by the teachers.

The teachers were asked what practices Montessori principals engage in when responding to their most difficult and/or frequent instructional leadership job/responsibilities. The teachers responded that the principals shared responsibilities with their teachers by asking them to contribute their ideas. In one school a teacher recorded on her questionnaire, "Our principal wants us involved, she gives us a lot of responsibility for making decisions . . . in our 'Team Meetings'" (Jan. 25 IILPMP #19 p. 2 lines 4-5, 6-8, 15-17, SMES). Another teacher on a questionnaire wrote, "Our principal helps us feel we are sharing the important responsibilities which make this school successful . . . Whenever a decision needs to

be made . . . we're given the opportunity to give input" (Jan. 25 IILPMP #1 p. 2 lines 11-21 SMES). On a questionnaire a teacher from the Southern Montessori Elementary School said, "Our principal treats us as high quality professionals who are there to share responsibilities with us" (Jan. 25 IILPMP #9 p. 3 lines 6-7 SMES).

A teacher in a focus group stated, "I've worked other places where the principals made all the decisions, but here our principal lets the teachers make recommendations, and he's willing to go with it" (April 27 Focus Group A p. 37 lines 319-325 NMES).

A teacher during an individual interview said, "Our principal works with us; he encourages the teachers to take on responsibilities (March 11 AFNA p. 13 lines 171-172 NMES).

During another individual interview a teacher indicated, "Each age level grouping in our school has a team made up of the teachers who teach at that level (preschool 3-6 team, 6-9 team, and 9-12 team). Team meetings are held once a month to deal

with problems and make decisions at their level" (Feb. 12 BMS p. 9-10 lines 107-119 SMES).

The Building Committee, which is made up of teachers, was identified as an example of principals practicing instructional leadership under the category of "the principal sharing responsibilities with the teachers." The Building Committee is made up of teachers elected from their respective Team Meeting groups. When teachers in the Building Committee make recommendations for policy changes the principals are asked to approve their recommendations. A teacher wrote on a questionnaire, "The Building Committee is the control center for concerns and school policy. Everyone has a 'say' and our principal respects the decisions made" (Feb. 22 IILPMP #11 p. 3 lines 10-12 NMES). A teacher during a focus group said, "We're at a point here being ten years old, we are allowed . . . in our Building Committee to sit down to make decisions and policy" (April 27 Focus Group A p. 29 lines 154-158 NMES). During an individual interview a teacher expressed, "Our principal is an active supporter of the TBC, and he does not see it as a threat as

some principals do. Some principals see it as a threat to their power. I have never felt that our principal is into 'power' games. He doesn't seem concerned that teachers might get too much power" (March 11 AFNA Interview p. 6 lines 27-40 NMES).

The teachers explained how the Building Committee makes decisions. A problem of student placement was identified and TBC developed a plan to solve it. The parents were originally allowed to pick the teacher for their children in the 9-12 classrooms, but this resulted in unbalanced classrooms. Because of the nature of Montessori education, the classrooms need a balance of males and females, ethnic background, and academic and leadership ability levels. A teacher in a focus group offered, "The Building Committee developed a strategy for determining which students would be placed in which 9-12 classrooms--by evaluating all the students according to test scores, leadership qualities, and ethnic background" (April 27 Focus Group A p. 35 lines 212-222 NMES).

Decisions about the teachers' contracts do not go to the TBC, but planning responsibilities do. A teacher reported during an individual interview, "Anything contractual does not go through TBC" (March 10 AFNA p. 9-10 lines 85-105 NMES). This teacher also said, "Our principal supports TBC, which is an example of how he shares the planning responsibilities for decision making with the teachers" (March 11 AFNA p. 6 lines 33-34 NMES).

The teachers stated that their principals practiced sharing responsibilities as an example of the principals' most difficult and/or most frequent instructional leadership job. Sharing visitors' observations between classrooms for parents and others is an example of how the principals share responsibilities in their Montessori schools. In years past some principals picked only certain classrooms for visitors to observe. A teacher in a Montessori school said, "Our principal highlights the positive aspects of our Montessori program (by sending people to observe in our classrooms) while not putting the burden of 'showing off' on a few teachers; the privilege is

passed around evenly. We appreciate her willingness to share this responsibility. Wednesdays are observation days and visitors now observe in different rooms on a rotating basis instead of a few rooms always being observed" [Jan. 25 IILPMP #7 p. 3 lines 2-11 SMES]. At another school a teacher explained during an individual interview, "We have parents come in at an assigned time to see what is happening in the different classrooms during the day. All rooms are available for observations" [March 5 JNC p. 9 lines 77-80 CMES].

Another example of how the principals shared responsibilities with their teachers, as an example of practicing instructional leadership, is allowing the teachers at the Northern Montessori Elementary School to plan and then take their students to a leadership training camp. A teacher responded on a questionnaire, "When a colleague and I decided to pursue a leadership training opportunity for sixth graders . . . our principal encouraged us . . . and even attended the camp" (Feb. 22 IILPMP #11 p. 3 lines 13-21 NMES). During a focus group interview a teacher said, "Our principal supported our 'Camp Joy'

which was using outdoor education for leadership training” (April 27 Focus Group A p. 21 lines 12-14, 17-21 NMES).

Principal sharing responsibilities with the parents. The teachers noted that the principals as instructional leaders shared responsibilities with the parents. The principals encouraged parents to be active and involved with school activities. There are several organizations which include parents. In one school a teacher recorded on a questionnaire, “Our principal encourages parent involvement” (Feb. 22 IILPMP #12 p. 2 lines 6-10 NMES). During a focus group interview a teacher said, “The Local School Decision Making Committee is made up of parents, local community people, administrators, and teachers; the Montessori Parent Organization is another committee which consists solely of parents and there are branches out of that; and the Parent Education Committee has parent and teacher members” [March 8 Focus Group A p. 17 lines 152-156 SMES]. These parent organizations take a very active part in planning special activities and raising money to do special things for the children attending the schools. During an

individual interview, parent involvement was confirmed, "We have very strong parent involvement" (Feb. 12 BMS p. 6-7 lines 45-48, 55-57 SMES).

Linking the principals' shared responsibilities with teachers and parents to transactional and transformational leadership theories. The teachers reported many activities under the category of sharing responsibilities that were considered transforming (Burns, 1978) because the leaders and followers raised each other to a higher level of motivation and morality. Teachers described other activities that were considered transactional because they involved exchanging something of value.

An example of transactional leadership occurred at the Northern Montessori Elementary School. The principal worked out a procedure with the teachers, as members of the Building Committee, for assigning students to their fourth level classroom. Prior to the new arrangement, parents had requested specific teachers for their children. This resulted in unbalanced classrooms with only the popular teachers getting the top

academic students. Through open and extended discussions between the teachers and the principal, a new policy was developed which does not allow parents to request a particular teacher for their child. Instead, the students are now divided according to their academic and leadership skills, ethnic background and sex. This new policy took pressure off the principal, who had been expected to comply with the parents' requested placement. The change of policy was a transaction, which was fair for the parents, and accepted by the teachers and principal. Sergiovanni and Starratt (1993) identified transactional leadership as often involving an exchange of favors between leader and follower. In this instance, the exchange of favors involved the teachers' getting a new balance of students in their classrooms, and the principal's being relieved of parent pressure.

The Montessori teachers described their Building Committee and their team meetings as groups who shared power and policy making with their principals. This is an example of leaders and followers working together in a mutual and

continuing pursuit of a higher purpose for improving the Montessori schools. Burns (1978) describes this as transformational leadership if it leads to a higher level of motivation and morality. When the teachers and the principal collaborated on developing new policies, such as the one described below, they were practicing transformational leadership at the level of reaching a higher level of motivation but not morality in this instance.

In accord with the previously described policy, visitors observed in only a few pre-selected classrooms. This made the teachers who were not selected feel they were not good enough for visitor observations. Now that the policy has been changed to rotate visitors to all classrooms, the teachers voiced that they felt very good. This raised the teachers' self-esteem and pride in themselves, which resulted in a higher level of motivation, but not morality. The teachers expressed their pride and genuine concern for their principal, who now gives them and their students continued respect. The principal showed this respect and confidence by allowing visitors to feel

free to visit any classroom. The teachers said the principal continues this policy since it has worked so well for the parents, teachers, and principal. Burns (1978) would describe this policy as transforming since it raised the level motivation for both the leader and led.

Summary of sharing responsibilities. The teachers reported that sharing responsibilities between teachers and parents was practiced by the Montessori principals as instructional leaders.

The principals practiced instructional leadership by sharing responsibilities, by supporting team meetings and The Building Committee, by sharing visitor observations between classrooms for parents and others, and by approving a student leadership camp planned by the teachers.

The principals also encouraged parents to be active and involved with school activities, another subcategory under sharing responsibilities. The Local School Decision Making Committee, the Montessori Parent Organization, and Parent Education Committee all have parents participating and sharing

responsibilities with the principals to help the Montessori schools.

Under the category of "sharing responsibilities" some activities performed by the teachers come under transactional leadership (Burns, 1978) because the activities involved exchanging something of value. For example, the teachers and the principal decided how the fourth level students would be assigned to their new classrooms.

As voiced by the teachers there were activities under the category of sharing responsibilities which exemplified transformational leadership (Burns, 1978), because the leaders and followers raised each other to a higher level of motivation, but not morality in these examples. An example is that of the teachers establishing new policies for their schools.

Preserving and Supporting the Montessori Programs

The Montessori teachers were asked what practices their principals engage in when responding to their most difficult

and/or most frequent instructional leadership job/responsibility in Montessori public schools. Under the category of "preserving and supporting the Montessori programs" the teachers wrote that their principals practice instructional leadership in the areas of: (1) understanding the dynamics of the Montessori program, (2) blending the Montessori curriculum with the public school curriculum, (3) having what is needed for the Montessori programs and mobilizing help to get these things, (4) supporting the Montessori report card committee, (5) preserving the Montessori program by educating the parents, (6) assisting and supporting Montessori students, and (7) modeling the Montessori philosophy.

In this school district the principals at the Montessori schools are required to be Montessori certified or working toward certification. This helps them understand and implement the Montessori philosophy. The teachers indicated that their principals practiced instructional leadership through their explaining Montessori education to parents, to the central office personnel, and to others in the community. The principals

helped incorporate the Montessori curriculum into the traditional public school curriculum, and the principals modeled the Montessori philosophy by encouraging project focused activities like the new Montessori report card, by assisting the students, and by showing respect.

Understanding the dynamics of the Montessori program.

Because the principals are Montessori trained, they discuss the Montessori program with the parents and the teachers. It is important for the principal to be able to explain the Montessori concepts to those just learning about the program as well as those experienced in Montessori education. As recorded by a teacher on a questionnaire, the principal as instructional leader preserves and supports the Montessori program by "understanding the dynamics within the Montessori environment since the method is so different from the traditional (methods)" [Jan. 25 IILPMP #4 p. 2 lines SMES]. On another questionnaire a teacher wrote, "Our principal (because of his knowledge) preserves the educational aims of Montessori so the greater system doesn't 'bastardize' our program . . ." [Feb. 22 IILPMP #16

p. 2 lines 4-7, 12-15 NMES]. At another school a teacher said, "Our principal is always explaining the Montessori philosophy to parents and others" [Feb. 22 IILPMP #12 p. 3 lines 5-6 NMES].

During a focus group a teacher said, "Montessori administrators need to talk about and discuss the philosophy with teachers and parents over and over again" [March 8 Focus Group A p. 14 lines 100-101]. Another teacher said, "Our principal understands the Montessori classroom procedures and dynamics; she is very helpful" [Feb. 18 Focus Group p. 16-17 lines 212-225 CMES].

Blending the Montessori curriculum with the public school curriculum. The principals practice instructional leadership as they integrate the Montessori curriculum into the district's curriculum. The Montessori curriculum includes a strong focus on history, geography, botany, zoology, and geometry plus the traditional subjects of math and language/arts. On a questionnaire a teacher wrote, "As instructional leader, our principal's job is to blend the Montessori curriculum with the expectations from the public

school curriculum. . . . Our principal supports the Montessori curriculum first" [Jan. 25 IILPMP #2 p. 2 lines 1-3, 10-12 SMES]. Another teacher wrote, "The principal needs to coordinate the two curriculums" [Jan 27 IILPMP #5 p. 2 lines 5-6 CMES]. Another teacher recorded on a questionnaire that the principal as instructional leader, "Knows the ramifications of the district programs and how to unify them with the everyday functioning of the Montessori curriculum" [Jan. 25 IILPMP #9 p. 2 lines 1-3 SMES]. The same teacher went on to say, "She does this by having a thorough knowledge of the Montessori curriculum" [Jan. 25 IILPMP #9 p. 2 lines 5-8 SMES]. At another school a teacher wrote, "Our principal maintains the philosophical goals of Montessori without compromising the curriculum. He allows the trained teachers to implement fully the entire Montessori curriculum in all subjects . . ." [Feb. 22 IILPMP #16 p. 2 lines 1-7 NMES].

An example of how the Montessori curriculum has been integrated into the district's school curriculum, is the language/arts project. A language/arts committee at the

Southern Montessori Elementary School developed the Montessori language curriculum as a continuum from age 3 to 12. During a focus group a teacher stated, "Our principal encouraged the teachers at our school to write up our Montessori language/arts curriculum . . . (For this curriculum) we didn't want the district's reading textbooks; we needed money invested in . . . Montessori materials" (March 8 Focus Group A p. 10 lines 11-16 SMES).

Having what is needed for the Montessori programs and mobilizing help to get these things. The principals in these Montessori schools worked to acquire the Montessori materials needed for their program; they provided reasons to keep the instructional assistants, and they encouraged parents to speak to the necessary members of the school district to keep the instructional assistants and to purchase Montessori materials. A teacher on a questionnaire said, "As an instructional leader in our Montessori school, our principal insists on having what is needed for a Montessori program including instructional assistants, materials, etc., in the face of budget cuts" [Feb. 22

IILPMP #10 p. 2 lines 2-5 NMES]. On another questionnaire a teacher said, "Our principal gets vocal support from parents who keep in contact with decision makers" [Feb. 22 IILPMP #10 p. 2 lines 7-11 NMES]. "This happened when our school district wanted to cut instructional assistants. He mobilized several groups in the school to speak against these cuts" [Feb. 22 IILPMP #10 p. 2 lines 14-17 NMES].

At the Southern Montessori Elementary School, a focus group reported that the principal supported the purchase of Montessori materials in general, but let the teachers decide specifically what they need. A teacher said, "We deal with material needs through our team groups, since we're so well established, and, if we put in a bill or a request, she trusts that we need it. If I say I need something for three different areas, she does not question my request . . ." [March 8 Focus Group B p. 26 lines 291-301 SMES].

Supporting the Montessori report card committee. The three Montessori schools had been using the same report card as the rest of the school district. The Montessori elementary

curriculum includes subjects not mentioned on a traditional report card including botany, zoology, history, and geometry. Also, Montessori schools do not use letter grades, and the social and moral development of the child is as important as academic progress. The new report card was developed by the teachers and administrators from the three Montessori schools. The Montessori principals preserved the Montessori program by supporting and helping the report card committee, which is an example of instructional leadership.

On a questionnaire a teacher wrote, "The report card committee had several questions or issues that needed to be answered, . . . the principals got the information we needed" [Feb. 22 IILPMP # 10 p. 3 lines 14-17 (rated 5) NMES]. During a focus group interview a teacher said, "We've been complaining about having to use the same report card the rest of the district uses for years. We had a committee work on revising it for over a year" [April 16 Focus Group B p. 12 lines 89-92 NMES].

Preserving the Montessori program by educating the Montessori parents. In order to preserve and support the

Montessori program, the principals at two of the schools have evening programs to help educate the parents. One teacher on a questionnaire said, "Our parents, for the most part, do not understand the Montessori program and need lots of training" [Jan. 27 IILPMP #5 p. 2 lines 6-8 CMES]. The Northern Montessori Elementary School has an evening program called "The Silent Journey" where, as one teacher explained, "Parents travel first hand through the three levels (3-6, 6-9, 9-12), exploring vertically the (Montessori) curriculum concepts" [Feb. 22 IILPMP #16 p. 2 lines 1-13 NMES]. "The Silent Journey" was explained in more detail during a focus group interview. A teacher said, "This is done with all levels (3-6, 6-9, 9-12) and it is a parent evening program. It's called 'Silent' because there is a lot of quiet 'work time'" (April 16 Focus Group A p. 11 lines 64-67 NMES). All three environments are set up with about fifteen exercises including a written description of how to do the activity. A teacher during a focus group said, "The purpose is for the parents to work with each other on the exercises set up, then after twenty minutes, questions are answered, and then

they move on to the next classroom with the next age group” [April 16, Focus Group A p. 10 lines 40-49, 54-56 NMES]. All the parents end up with the principal in the auditorium where they ask questions and reflect on how this journey compares with their own school experience. During one of the individual interviews a teacher explained, “At our school the ‘Silent Journey’ happens on three different nights in order to let as many parents as possible choose what night is best for them” [March 11 AFNA p. 7 lines 44-49 NMES].

Assisting and supporting Montessori students. The teachers reported that their principals practiced instructional leadership by preserving and supporting the Montessori program through assisting and supporting Montessori students. In a typical scene, the students are independently working on different projects, moving around the classroom and other parts of the school building, and taking responsibility for their own behavior and work completion. The Montessori principal moves throughout the buildings, giving practical tips to the students, and observing their work. On a questionnaire a teacher wrote,

"My principal visits the classrooms and observes if the children are on task and concentrating" [Feb. 22 IILPMP #8 p. 2 lines 7-9 NMES]. Another teacher said on a questionnaire, "He helps the children see how they can manage themselves in general. He gives practical information for achieving goals and keeping the environment effective for learning" [Feb. 22 IILPMP #8 p. 2 lines 15-19 NMES]. If there is a concern about how a student is cooperating, one teacher expressed, "Our principal sits down with the student (in the classroom) and talks about strategies of how to handle a situation better next time" (Feb. 22 IILPMP #3 p. 2 lines 6-8 NMES). The Montessori philosophy always works from a positive approach. When dealing with disruptive students one teacher said on a questionnaire, "The principal involves the students, asking for their input to solve the problem. He stays very positive and has high regard for the child's self-esteem" (Feb. 22 IILPMP #9 p. 3 lines 4-8 NMES).

Modeling the Montessori philosophy. Modeling the Montessori philosophy includes showing respect, being analytical, and involving others in decision making as voiced by

the teachers about their principals as instructional leaders.

During the focus group interviews one of the teachers said, "She always keeps in mind how important 'respect' is to her teachers; she has done this from day one. She even got a standing ovation at the end of last year because of the great respect she had shown all of us all year. She has that Montessori curiosity about getting all the information before making a decision. If there are differences among members of the staff, she always gets all the people together who are involved with the situation before a decision is made" [March 8 Focus Group B p. 22 lines 215-222 SMES]. During a focus group interview a teacher said, "Even with people who are strangers and come into the office, she shows complete respect; she models respect just like the Montessori philosophy believes in respect to all; she shows that to everyone, not just the children but to everyone" [March 8 Focus Group B p. 26 lines 286-290 SMES].

Linking, preserving and supporting the Montessori program to transactional and transformational leadership theories. A number of activities under the category of

"preserving and supporting the Montessori program" served as examples of transactional and transformational leadership theories (Burns, 1978), which are defined earlier in this chapter.

As an example of transactional leadership, the teachers explained how their principals acquired the expensive and extensive Montessori materials needed for the classrooms. This is an example of an exchange of something of value. The teachers requested certain Montessori materials for their classrooms, and, when they received what they wanted, their loyalty to their principal and to their school was strengthened. When the Montessori schools first opened, their teachers were not asked what materials they needed. The teachers then expressed disappointment; but now they ask for and receive the materials they need. Sergiovanni and Starratt (1993) describe an exchange of a favor where people are seeking their own individual interest as transactional leadership. The teachers receive the equipment they want, and the teachers reported that

the principal is pleased because the classrooms are better equipped.

The teachers expressed how important it is for their principals to have Montessori training. Because the principals had Montessori training, the teachers could work with them toward a mutual belief system for the entire school. The principals, as reported by the teachers, were constantly working toward preserving the educational aims of the Montessori philosophy with teachers, parents, community people, and the personnel at the central office. The teachers also reported that they talked to their principals about the philosophy, giving both the principal and the teacher a sense of support and mutual respect. When the teachers and the principal collaborated on integrating the Montessori curriculum with the district's curriculum, such as the example described below, they were practicing transformational leadership while preserving the educational aims of the Montessori philosophy.

According to the teachers, the principals explained and commended the Montessori methods, curriculum, and philosophy

to the central office personnel. For example, the teachers at the Southern Montessori Elementary School developed a Montessori language/arts curriculum which they integrated into the district's language/arts curriculum. The principal took it to the central office personnel and got it approved. This was transforming because it elevated the teachers' and principal's pleasure at the program's acceptance. The Montessori curriculum is valued extensively, and both teachers and principals work hard to keep it the focus of their campus curricula. The principals shared a collaborative, professional school culture with their teachers which is transforming (Leithwood, 1992).

Summary of preserving and supporting the Montessori program. The teachers said their principals practiced instructional leadership by preserving and supporting the Montessori programs. The teachers explained that the principals understand the dynamics of the Montessori program because the principals had either taken Montessori training or were Montessori certified. The principals, therefore, were able to

discuss the Montessori philosophy with teachers, parents, and others in the community. Furthermore, the principals practice instructional leadership as they integrate the Montessori curriculum into the district's curriculum. The teachers also described how the principals provided teacher requested Montessori equipment and materials. Also, a report card committee developed a Montessori report card, which the principal helped formulate.

The principals practiced instructional leadership, according to the teachers, by preserving the Montessori program through educating the parents, assisting and supporting the Montessori students, and modeling the Montessori philosophy.

As an example of transactional leadership, the teachers explained how the principals acquired the specific Montessori materials, which the teachers had requested for their classrooms.

The Montessori principals practiced transformational leadership by preserving the educational aims of the Montessori philosophy with the teachers assistance. This resulted in the

principals and teachers rising to a higher level of motivation and morality. Their moral attitude involves a belief that together they are doing what is right for their students. Their attitudes, values, and beliefs are transformed to attend to the purposes of the Montessori philosophy and for the good of the children and the organization. As an example, the Montessori language/arts curriculum was integrated into the district's curriculum.

School Procedures

The research question concerned the practices that Montessori principals engage in when responding to their instructional leadership responsibilities. The instructional leadership practices of the principals, which were identified by the teachers, included "school procedures." Under the category of "school procedures" the teachers' responses to the questionnaires, focus group, and individual interviews, were identified under the following subcategories: (1) providing

support services for students, and (2) providing student directed discipline and clear school discipline procedures.

Providing support services for students. The teachers explained that their principal practiced instructional leadership by showing concern and compassion for the children with special needs. If children had emotional, learning, or family problems, the principals worked hard to get the help these children needed. As expressed by the teachers, each school has a teacher they call a "visiting teacher." If the child misses school and cannot be reached, the visiting teacher goes out into the community to the child's home. The teachers described that many of the children in these Montessori alternative/magnet schools do not live with their parents, they do not have telephones, and they move often; therefore, they are hard to locate. These transient children have special needs because they lack family stability, and, often, the basic needs of food, clothing, and housing. Under school procedures the teachers wrote on a questionnaire, "Our principal obtains support services for students with learning or emotional disabilities.

He has recruited the best visiting teacher available, one who is persistent in following through on referrals" [Feb. 22 IILPMP #4 p. 2 lines 1-2, 4-11 NMES]. During an individual interview a teacher explained further, "Our principal, is very supportive of the needs of the children. If a child is absent a lot, the visiting teacher will go to see if the child is sick. If a child does not have a regular address, the visiting teacher is sent to find out where he/she is living" [Feb. 12 BMS p. 7-8 lines 69-74 SMES]. "Our principal has also been extremely receptive to additional services that aid students, such as music therapy" [Feb. 22 IILPMP #4 p. 2 lines 1-2, 4-11 NMES].

Providing student directed discipline and clear school discipline procedures. As instructional leaders, the principals were supportive of the students who were involved in school discipline procedures. The Fuss Buster's Program, which is a peer mediation program, was explained. A teacher in a focus group said, "A group came to school about three years ago and trained the older students and many teachers to do peer mediation. The Fuss Busters are out on the playground, and if

two children get upset with each other, the Fuss Buster has each child express his/her side of the situation and each child also has to listen and repeat what he/she heard the other one say; then they discuss how to resolve the problem" [April 16 Focus Group B p. 17 lines 177-183 NMES]. During an individual interview further information was given, "I think because of the peer mediation program, where the students go to training about how to deal with their own problems (problems between students), the students can leave the playground without taking a problem with them back to the classroom" (March 10 RRNA p. 8 lines 79-83 NMES).

The teachers also described the method the principal used to clarify the school's discipline procedures, which have been developed by the discipline committee made up of teachers. The principal explains the school rules to the students, but, as one teacher offered during a focus group interview, "There is a written discipline procedure. The teachers set up the discipline rules through the discipline committee" (April 16 Focus Group B p. 18-19 lines 202-203, 214-215 NMES). At the Northern

Montessori Elementary School, "Our principal starts the school year out by taking each group of children (about six classrooms in each group) to the auditorium and goes over the rules. Then half-way through the year he (the principal) meets with them again, 'You're half way through the year, and you've done a good job; let's keep it up.' He keeps in touch with each group throughout the year, going over the total bus rules, goes over the touch rule, and total school rules" (March 10 RRNA lines 33-41 NMES).

If there are student discipline problems, the teachers described the procedures that are followed. As written on a questionnaire, "If there are problems with a student, there is a clear-cut method or set of steps to go through to deal with it" (Feb. 22 IILPMP #5 p. 2 lines 15-17 NMES). At the Central Montessori Elementary School a teacher during a focus group interview explained the discipline procedure, "The teacher will address the child, then the teacher will address the parent, then the principal will be asked to help" (Feb. 18 Focus Group p. 15 lines 195-198 CMES). The principal at the NMES will become

involved by simply talking to the student with a discipline problem. During a focus group a teacher noted, "It doesn't happen often, but if I have a child that isn't cooperating, our principal takes the child off to one side and talks to him/her. That (talk) seems to help the child get back on track. The children seem to truly respect him. So whatever comes out of his mouth the children respond to" (April 16 Focus Group B. p. 17-18 lines 188-193 NMES). At the Southern Montessori Elementary School a teacher said, "If we send a child to our principal, she believes that we have done (followed all the procedures) all we can (to help the child deal with his/her discipline problem). I feel so comfortable that I can put my heart and soul into what I was hired to do, which is to teach" (March 8 Focus Group B p. 27 lines 303-306 SMES).

The teachers went on to explain that their principals, as instructional leaders, often involve the parents as part of the discipline procedures. If the discipline problem does require the parent to come to the school, it is important that the parent cooperate. A teacher during an individual interview noted, "If

the parents are asked to come to the school and they don't come, the child may have to stay home for three days." In return, the parents will come because they "don't want their children to stay home for three days" (March 10 RRNA p. 8 lines 79-83, 92-96 NMES).

Linking school procedures to transactional and transformational leadership theories. Under the category of "school procedures," which emerged during the data analysis, the Montessori teachers gave examples of how their principals practiced instructional leadership. The theories of transactional leadership and transformational leadership have been used to inform the reader's understanding of the Montessori principals instructional leadership practices as identified by the teachers.

As identified by the teachers, the Montessori principals, through their "school procedures," practiced transactional leadership by enforcing the school discipline procedures, which the teachers had developed. At the NMES, the principal spends valuable time reminding the students about the discipline

expectations, which allows the teachers to spend more time teaching. The written discipline procedures had been developed by the discipline committee, which was made up of teachers. Sergiovanni and Starratt (1993) identify transactional leadership as frequently involving an exchange of favor, and, in this example, the principal has well established school discipline procedures, and the teachers have support from their principal to enforce their discipline procedures.

Transformational leadership was practiced by the Montessori principals under the category of "school procedures," as described by the teachers. The principals and teachers were raised to a higher level of motivation and morality (Burns, 1978) as they provided assistance for the children with emotional, learning, and/or family problems. The teachers would identify children in their classrooms who had special needs. The principals would find special help or services for these children, which the teachers greatly appreciated. Seeing the children improve and become productive learners raised the principals and teachers to a higher level of motivation and

morality. As an example of special services, the teachers explained, the visiting teacher will find students who have missed school and have not contacted the office. As a result, the students return to school and their special needs are dealt with through special services. This sequence of events raises the level of human ethical aspiration of both the principal and the teacher involved, thus it has a transforming effect on both (Burns, 1978).

Summary of school procedures. The teachers reported examples of school procedures which were planned and practiced by the Montessori principals as instructional leaders. The teachers expressed that their principals had shown concern and compassion for the children with special needs which came under the subcategory of providing support services for students. The teachers also identified how the principals, as instructional leaders, supported student directed discipline procedures and had clear school discipline expectations. Teachers appreciated the peer mediation program. Clear

discipline procedures support a strong learning environment especially where students are self-directing themselves.

Transactional leadership occurred when the principal enforced the discipline procedures which the discipline committee had developed. An exchange of valued things (Burns, 1978) is a transaction. The principal has a well established school discipline procedure, and the teachers have support from their principal to enforce their discipline procedures.

The principal and teachers were raised to a higher level of motivation and morality (Burns, 1978) as they provided assistance for the children with emotional, learning, and/or family problems. This is an example of transformational leadership because it raised the level of human ethical aspiration of both the principal and teacher involved.

Summary

The following general categories were identified by reviewing the teachers' responses to what were the most frequent or most difficult job (responsibilities) practiced by

the Montessori principals as instructional leaders: (1) communication techniques, (2) shared responsibilities, (3) preserving and supporting the Montessori program, and (4) school procedures. In this chapter the findings have been described starting with the responses from the questionnaires, then the focus groups, and finally the individual interviews. The theories of transactional leadership and transformational leadership were used to better inform the reader's understanding of each category involved in the research.

Burns (1978) described transactional leadership occurring when one person makes contact with others for the purpose of exchanging something of value either economic or political or psychological in nature. Transformational leadership (Burns, 1978) occurs when one or more people work together in a way that leaders and followers raise one another to higher levels of motivation and morality.

By reviewing the teachers responses to the three methods of collecting the data, the category of "communication" emerged and the following subcategories emerged: (1)

communicating openly, calmly, clearly, and fairly with a varied school community, (2) building consensus through communication, and (3) practicing public relations through communication. Transactional leadership was practiced by the Montessori principals when they taught the parents about the Montessori method, and, in return, the parents became advocates of the Montessori system of education. When the teachers and principals worked together to improve their school's program, transformational leadership was performed.

Under the category of "sharing responsibilities," which emerged during the data analysis, the teachers said their principals: (1) shared responsibilities with the teachers through teacher committees, through sharing visitor observations between classrooms, and through approving student leadership camps planned by the teachers; and (2) shared responsibilities with parents. When the teachers and principals decided how the fourth level students would be assigned to their new classrooms, the principals practiced transactional leadership because it involved exchanging

something of value. As expressed by the teachers, when new policies were formulated by the teachers with the approval of the principals, transformational leadership was exemplified.

By reviewing the teachers responses to the three methods of collecting the data, the category of "preserving and supporting the Montessori programs" emerged and the following subcategories emerged: (1) understanding the dynamics of the Montessori program, (2) blending the Montessori curriculum with the public school curriculum, (3) having what is needed for the Montessori programs and mobilizing help to get these things, (4) supporting the Montessori report card committee, (5) preserving the Montessori program by educating the parents, (6) assisting and supporting Montessori students, and (7) modeling the Montessori philosophy. As an example of transactional leadership, the teachers explained how the principals acquired the specific Montessori materials which the teachers wanted for their classrooms. Transformational leadership was practiced when the principals and teachers integrated the

Montessori language/arts curriculum with the district's curriculum and got it accepted by the central office personnel.

The instructional leadership practices of the principals, which were identified by the teachers, included the category of "school procedures" which emerged during the data analysis. Under this category, the following subcategories emerged: (1) providing support services for students, and (2) providing student directed discipline and clear school discipline procedures. Transactional leadership was practiced when the principals went over the school discipline procedures with the students, which the teachers had developed. As an example of transformational leadership, the principals and teachers were raised to a higher level of motivation and morality (Burns, 1978), as they provided special services for children with emotional, learning, and/or family problems.

Chapter V will include the summary of the literature review, research methods, findings and interpretations of the data, plus implications for future research and the limitations of the study.

CHAPTER V
FINDINGS, CONCLUSIONS, IMPLICATIONS,
AND FUTURE RESEARCH

Introduction

Research on the work of principals has increased in recent years (Blase, 1987A). Much of this research has discussed principals as instructional leaders (Prickett, Richardson, Short, & Lane, 1990; Ahadi, 1990; Wright, 1991; Ahmed, 1981; Stronge, 1988; Rallis, 1988; Tallericco & Blumberg, 1991). This research defines the skills and qualities that principals should possess as instructional leaders, but research is lacking in how these skills and qualities are to be assessed (Prickett, Richardson, Short, & Lane, 1990) or whether these skills needed are different in non- traditional schools.

There are several trends in education that are influencing school leadership practices. "Leaders for America's schools need the strongest knowledge base possible to face the

uncertainties of each day. Efforts toward site-based schools require knowledge and skills in collaborative planning and decision making, curriculum development and instructional management" (Hoyle, 1991, p. 21). Montessori principals need their knowledge base to include information about instructional leadership practices which will specifically strengthen their Montessori schools.

Another trend that may influence the practice of instructional leadership in alternative public schools is the growth in the number of Montessori public schools. In these schools the teachers must have Montessori training or certification which requires hundreds of hours beyond their state teaching credentials. However, the Montessori public school principals have no course preparation that specifically prepares them to function as public Montessori school administrators. This lack of a common background may impair the practice of transactional and transformational leadership (Burns, 1978). Burns described transactional leadership occurring when one person makes contact with others for the

purpose of exchanging something of value either economic or political or psychological. Most often it engenders short-lived relationships and the leader and led move on to other interactions. Although he recognizes it as a transitory leadership engagement, he concedes it has a useful, legitimate function. Transformational leadership (Burns, 1978) occurs when one or more people work together in a way that leaders and followers raise one another to higher levels of motivation and morality. Leithwood (1992) suggests that transformational school leaders provide the necessary incentives for teachers, parents, and others to initiate improvements in their school practices. As a result of transformational leadership the leaders and followers are united in pursuit of higher level goals that are common to both (Sergiovanni, 1990). Burns' leadership theories were used in this research to better inform the reader's understanding of the findings.

Blase (1987A) states that there is a developing knowledge base regarding effective school principalship but little attention has been given to the relationship between

leadership and the school context variables. Although some studies (Daresh & Liu, 1985; Hannay & Stevens, 1984; Kleine-Kracht, 1993; Liu, 1984) provide detailed qualitative descriptions of school context, few studies (Blase, 1987A, 1987B, 1989, 1992; Galney, 1990; March, 1984; Sergiovanni & Corbally, 1984; Smith & Blase, 1988; Smylie & Brownlee-Conyers, 1990) describe the principals' actions specifically from the teachers' perspective. According to Blase (1987A):

The 'thick descriptions' necessary for understanding the complex nature of the school are noticeably lacking. These types of qualitative data are essential to building descriptions and substantive theories of school-based leadership grounded in the meanings, values, norms, and symbolic structures characteristic of school cultures. (p. 590)

Because the teachers are the recipients of the principals' instructional leadership practices, the Montessori teachers in this study were asked to describe how their Montessori principals practiced instructional leadership.

This study is significant because it provides new insight into a topic of interest to the public and it gives information on

an issue of national importance. The Montessori method is now practiced in more than 164 public schools in 92 districts and 4,000 private schools throughout the United States (Schapiro, 1994), and it is moving steadily into more public and private schools.

Montessori schools have special needs beyond the unique requirements of other magnet programs. In these schools they use the Montessori methods, curriculum, and philosophy to direct the child's learning experiences. The study's findings add to the knowledge base of Montessori administration and, in particular, how Montessori principals can better practice instructional leadership in their Montessori schools.

Literature Review

1. Maria Montessori (1870-1952) was the first Italian female physician. She developed a special method of teaching young children after working with mentally retarded children in Italy.

2. Montessori's approach to teaching

From 1896-1907 she taught at the university level in Rome. In 1907 she opened her first Casa dei Bambini (Children's House) where she adapted her methods to normal children. In the preschool environment the young children ages 3-6 enjoy a beautifully prepared environment of multi-sensory materials laid out in an ordered sequence that allows children to both enjoy and succeed at learning.

In 1935 Montessori (Montessori, 1973) developed her elementary program for children ages 6-9 or 9-12. The child's intellectual, moral, social, and emotional needs were considered equally important in the educational environment. John H. Pestalozzi and John Dewey also expressed the doctrine that the whole child must be educated (Doughton, 1935; Hildreth, 1966). The starting point in the Montessori elementary program is Cosmic Education (Montessori, 1973) which includes the holistic and integrated vision of the world.

Research in the area of Montessori education is limited to several studies about the educational outcomes of students attending Montessori schools. These research studies

(Stodolsky & Karlson, 1972; Berger, 1969; Seefeldt, 1977; Erickson, 1969) indicated that children with Montessori experience often perform significantly higher on a number of tests than children without a Montessori experience.

The literature review also examined the preparation programs for school administrators. "Despite the earnest efforts of various reformers, educational administration today remains much as it was a decade ago" (Duke, 1992, p. 768). The first area of review involved both professionals' beliefs about the problems in training school administrators and their suggested remedies. The second topic of review focused on what Montessori experts believe should be included in training programs for Montessori public school administrators. "A principal in a Montessori school must familiarize him/herself comprehensively with the unique principles of Montessori pedagogy and its practice" (Kripalani, 1992, p. 2).

The literature review also included how instructional leadership is defined and what research has been reported in the area of instructional leadership. Wright (1991) explains that

since teaching and learning are the most important activities in schools, principals might spend a majority of their time as instructional leaders; however, Wright found that principals spend little time on task as instructional leaders. In a Pennsylvania State University dissertation, Ahmed (1981) determined that elementary school principals spent more time on "staff personnel" than "instruction and curriculum development." Stronge (1988) determined that elementary school principals in Illinois spent only eleven percent of their time on instructional leadership activities.

Direct and indirect instructional leadership practices of public school principals were included in the review of literature. Daresh and Liu (1985) used a questionnaire designed to identify the extent to which principals believe that they engaged in various direct and indirect instructional leadership behaviors clustered into five separate scales: staff development, teacher supervision and evaluation, instructional facilitation, resource acquisition, building maintenance, and student problem resolution. This study (Daresh & Liu, 1985)

provided evidence that high school principals engaged in more indirect instructional leadership than direct.

Open issues on instructional leadership were described. Open issues included: (1) There are no research studies specifically about Montessori administrators. (2) Preparation programs for school administrators need revision. Remedies have been suggested but no research has been conducted to suggest how Montessori administrators should be trained. (3) There are a limited number of qualitative research studies which identify instructional leadership practices of principals (Hannay & Stevens, 1984; Liu, 1984; Daresh & Liu, 1985; Kleine-Kracht, 1993). (4) Some of the research on methods of assessing instructional leadership (Prickett, Richardson, Short, & Lane, 1990; Tallerico & Blumberg, 1991) used only one method of collecting data. In the present study internal validity was strengthened through triangulation (Goetz & LeCompte, 1984). (5) The present study is the first to identify the practices of the principals as instructional leaders in Montessori schools. (6) There is no research in Montessori education that links

transactional leadership and transformational leadership theories (Burns, 1978) to the instructional leadership practices of Montessori principals.

Research Methods

The purpose of this study was to describe instructional leadership practices of Montessori public school principals as reported by Montessori public school teachers.

A pilot study was conducted with nine Montessori teachers in a midwestern metropolitan city. The pilot study offered practice for each procedure used for the research and, if necessary, changes in the procedures were initiated.

For the pilot study and for the actual study, the data were collected and coded according to qualitative research guidelines for constant comparative analysis described by Bogdan and Biklen (1992). This approach to qualitative inquiry began with an open-ended questionnaire entitled "The Inventory of Instructional Leadership Practices of Montessori Principals" (IILPMP). The questionnaire was completed by a total of

fifty-four Montessori public school teachers from three different urban Montessori schools in a midwestern metropolitan city. Constant comparative analysis in qualitative research methodology permits topics and categories to emerge directly from the data (Bogdan & Biklen, 1992).

Qualitative researchers are concerned with accurate assessment of perspectives (Bogdan & Biklen, 1982); therefore, the second phase of the project involved thirty teachers who were part of five focus groups organized at the three Montessori schools. The contemporary focus group interview involves several individuals who discuss a particular topic under the direction of a moderator (Stewart & Shamdasani, 1991).

Teachers at each school who answered their initial questionnaire with similar responses about how their principals practice instructional leadership were invited to meet as members of a focus group. These semistructured interviews were audio taped and transcribed.

The third phase of the research project involved an interview session with seven teachers who answered the initial

questionnaire. Teachers chosen were those whose responses were not clear or whose responses were extensive and covered a number of topics which allowed the gathering of more detailed information. The teachers were asked to review the interpretations of their particular questionnaire responses and to expand on their perceptions of their principals' instructional leadership practices. These interviews were audio taped and transcribed.

The researcher alone coded all the data through a line-by-line inspection of the Montessori teachers' responses to the questionnaires and transcriptions of the focus group and individual interviews. After reviewing the responses, the descriptive data were listed under topics. When the findings were described in Chapter IV by the researcher, all of the topics were brought together and put under one of four major categories. As an example, many of the topics included information about how the principals used communication skills as part of their instructional leadership practices; therefore, the researcher decided on "communication techniques" as one of

the four major categories. The categories have subcategories which help describe the principals instructional leadership practices as described by the teachers.

After the interpretations of the data were written, member checks and a peer debriefing (Lincoln & Guba, 1985) session were conducted. For the member checks, the researcher met individually with a teacher participant from each of the three Montessori schools. The researcher described the entire research design and the findings. Each of the teacher participants responded individually to the data, analytic categories, interpretations, and findings. While meeting with each teacher both teacher and researcher read through many of the actual quotes which described each category. The teachers agreed with the interpretations of the data.

The peer debriefing (Lincoln & Guba, 1985) was performed with a teaching associate in qualitative research at a large state university in a midwestern metropolitan city. For several hours the peer debriefer probed the methodological, legal, and substantive aspects of the paper with the researcher,

and acknowledged that all these areas of concern were carefully considered.

Both the member checks and the peer debriefing allowed the inquirer to probe more deeply into the meanings and interpretations of the entire research. It helped clarify and bring a holistic view to the completed project.

Validity and reliability in this qualitative research were considered and supported through the research design. External validity was addressed to an extent by the multi-site selection. The increase in size of selection from one to several sites supports a study's generalizability (Goetz & LeCompte, 1984). The internal validity criterion was strengthened through triangulation (Goetz & LeCompte, 1984) by using three methods of collecting data, through member checks (Lincoln & Guba, 1985), and through "verbatim accounts of participants conversations" (Goetz & LeCompte, 1984, p. 218). The verbatim accounts resulted in using primary data (Goetz & LeCompte, 1984) or the teachers voices to describe the principals practicing instructional leadership.

External reliability was enhanced as the researcher recognized and addressed the four major reliability concerns (Goetz & LeCompte, 1984): description of the researcher's status position, description of the teachers, description of the social situation and conditions, and description of the methods used for data collection and analysis. Internal reliability, which refers to the degree other researchers would match the generated constructs with the data in the same way as the original researcher did (Goetz & LeCompte, 1984), was supported by recording and saving all the data collected throughout the study. The analysis process also demonstrated similarities between the three sites to emerge which contributed to internal reliability (Goetz & LeCompte, 1984). Peer debriefing (Lincoln & Guba, 1985) also strengthened the internal reliability.

CHAPTER 5

5

Findings and Interpretation of the Data

Sixty-six teachers in three elementary Montessori public schools in a midwestern metropolitan city were invited to

participate in this study. Fifty-four teachers volunteered to participate. The three alternative schools have 1,552 students in preschool through the sixth grade. This school district has sixty-three percent black students and any child entering kindergarten is eligible to apply for the Montessori alternative program. Achieving racial balance is an important consideration in selecting students. In order to be a principal in a Montessori school in this district one must have or be working toward Montessori certification.

When asked what the most frequent or most difficult jobs (responsibilities) practiced by their principals as instructional leaders were, the teachers' responses resulted in the following general categories: (1) communication techniques, (2) shared responsibilities, (3) preserving and supporting the Montessori program, and (4) school procedures. After reviewing several leadership theories, the researcher chose Burns' transactional and transformational leadership theories to better inform the reader's understanding of the findings.

Burns (1978) says transactional leadership occurs when one person makes contact with others for the purpose of exchanging something of value either economic or political or psychological in nature. Transformational leadership (Burns, 1978) occurs when one or more people work together in a way that leaders and followers raise one another to higher levels of motivation and morality.

Under the category of "communication" the teachers responded that their principals as instructional leaders were able to: (1) communicate openly, calmly, clearly, and fairly with a varied school community, (2) build consensus through communication, and (3) practice public relations through communication. Transactional leadership was practiced by the Montessori principals when they taught parents about the Montessori method, and, in return, the parents became advocates of the Montessori system of education. When the teachers and principals worked together to improve their schools' program, transformational leadership was achieved.

Under "sharing responsibilities" the teachers expressed how their principals practiced instructional leadership by: (1) sharing responsibilities with the teachers through work with teacher committees, through sharing visitor observations between classrooms, and through approving student leadership camps planned by the teachers; and (2) sharing responsibilities with parents. When the teachers and principals decided how the fourth level students would be assigned to their new classrooms, the principals practiced transactional leadership because it involved exchanging something of value either economic, political, or psychological. As expressed by the teachers, when new policies were formulated by the teachers with the approval of the principals, transformational leadership was exemplified.

Under the category of "preserving and supporting the Montessori program" the teachers wrote that their principal practiced instructional leadership in the areas of: (1) understanding the dynamics of the Montessori program, (2) blending the Montessori curriculum with the public school

curriculum, (3) having what is needed for the Montessori programs and mobilizing help to get these things, (4) supporting the Montessori report card committee, (5) preserving the Montessori program by educating parents, (6) assisting and supporting Montessori students, and (7) modeling the Montessori philosophy. As an example of transactional leadership, the teachers explained that the principals acquired the specific Montessori materials which the teachers requested.

Transformational leadership was practiced when the principals and teachers integrated the Montessori language/arts curriculum with the district's curriculum and got it accepted by the central office personnel.

Under the category of "school procedures" the teachers' responses were identified under the following subcategories: (1) providing support services for students, and (2) providing student directed discipline and clear school discipline procedures. Transactional leadership was practiced when the principals worked with the parents to resolve their childrens' discipline concerns. As an example of transformational

leadership, the principals and teachers were raised to a higher level of motivation and morality (Burns, 1978) as they provided special services for children with emotional, learning, and/or family problems.

The following section describes how the literature review on instructional leadership compares to the findings of how Montessori principals practiced instructional leadership as described by the Montessori teachers in this study.

Instructional Leadership Research Compared to Findings

The review of literature on instructional leadership identified that principals should instill ownership among members of their staff (White-Hood, 1991; Andrews, Basom & Basom, 1991; Rosen, 1992). The Montessori teachers also expressed how their principals instilled ownership by sharing responsibilities with the teachers, and encouraging parents to take part in school activities and planning. The teachers reported that their principals allowed and encouraged the

teachers to play an active part in the decision making process of the Montessori schools. The principals asked their teachers to take initiative for making decisions during the team meetings and Building Committee meetings. Parents felt a sense of ownership through their participation in the Local School Decision Making Committee, the Montessori Parent Organization, and the Parent Education Committee.

Richardson, Flanigan, and Blackburn (1991) summarize the skills of effective principals to include plans for staff development, providing adequate resources, sharing information about high quality instruction, and providing opportunities for group problem solving.

Under the topic of inservice, further literature and current research (Hannay & Stevens, 1984; Daresh & Liu, 1985; Liu, 1984; Hansen & Smith, 1989; Sparks, 1992A; and Prickett, Richardson, Short & Lane, 1990) express how important staff development is and that it should be experienced according to current research. The Montessori teachers, at the schools involved in the present research, seldom mentioned staff

development activities, but they did mention how very important training was for parents and others in the community in order to help them learn about the Montessori method of education.

In the area of providing adequate resources (Richardson, Flanigan, & Blackburn, 1991), the Montessori teachers expressed that their principals worked to acquire the Montessori materials needed for their programs and encouraged parents to ask the school district personnel to purchase Montessori materials. Parents also had fund raisers to help purchase materials.

Under the skill of sharing information about high quality instruction, the Montessori teachers said their principals practiced instructional leadership as the teachers and the principals integrated the Montessori curriculum into the district's curriculum. The Montessori elementary curriculum includes a strong focus on history, geography, botany, zoology, and geometry plus the traditional subjects of math and language. Group problem solving was encouraged by the Montessori

principals. As an example, a teacher during a focus group interview said, "Our principal encouraged the teachers at our school to write up our Montessori language/arts curriculum." The importance of work on curriculum between principal and teacher was also expressed by Bernd (1992).

For instructional leadership to be effective the principal's interaction with the rest of the school should be very personal (Lane, 1992; Daresh, 1991; Hallinger, 1986; Stronge, 1990). The Montessori teachers expressed, "Our principal listens to all sides . . . he works to draw all factions together." When there are concerns about helping students at the Montessori schools the principals make personal contact with students, teachers, and parents. The personal but professional relationships between the Montessori principals and the school community were expressed by the teachers.

Lance (1992) stated that the principal as an instructional leader needs to understand the key values that drive the school's culture. As reported by the Montessori teachers, the Montessori principals as instructional leaders

preserved and supported the Montessori program by understanding the Montessori methods and philosophy in order to direct the schools' culture toward a unified set of goals and values.

Leithwood (1992) described that instructional leaders should make "second-order changes" which include improving communication. The teachers at the Montessori schools voiced that their principals were able to communicate openly, calmly, clearly, and fairly with a varied school community; build consensus through good communication; and practice public relations through skilled communication.

Both direct and indirect instructional leadership practices were identified in the review of literature and by the Montessori teachers. Daresh and Liu (1985) stated that direct instructional leadership occurs when the principals practice supervision, evaluation, or inservice behaviors. Under direct instructional leadership practices in Montessori schools the teachers expressed that their principals provided inservice activities for parents and others in the community. They also

practiced teacher evaluation which modeled the Montessori philosophy. As an example of evaluation, one teacher said, "When evaluating our teaching, the principal visits our classroom to see if the students are on task and concentrating. He observes to see if the students are in large or small groups or working individually."

Indirect instructional leadership activities include behaviors that deal with the schools' internal and external environment, the physical and cultural context surrounding the classroom, teaching, and curricula, and how the teachers see their principals reacting to them (Kleine-Kracht, 1993). Under indirect instructional leadership practices, the Montessori teachers said that their principals involved the school community in "project focused" and "hands on" activities, their principals convinced the central office to allow the Montessori schools to develop projects unique to their schools, and their principals modeled the Montessori philosophy by being curious and showing respect.

Research Implications

The goal of this study was to determine from the Montessori teachers perspectives what practices Montessori principals engage in when responding to their most difficult and/or most frequent job (responsibility) as instructional leaders. Four categories emerged from the data analysis: communication techniques, shared responsibilities, preserving and supporting the Montessori program, and school procedures. Based on the findings under each category, the training for Montessori principals would differ in many ways from that of principals in conventional schools.

It is important for a principal at a Montessori school to have training in the philosophy, materials, curriculum, and methods of Montessori education. He/she should use this background information to communicate the philosophy and methods to parents, members of the community, and members of the school board and central office personnel. Knowledge about the Montessori materials, which are extensive and play a major role in the Montessori environment, would give the principal a

foundation for understanding what needs to be in each classroom and why he/she needs to support the purchase of these materials instead of buying other items like basal readers. Understanding the Montessori curriculum would help principals support the classroom activities and organization. Some examples of these are as follows: three age groups in each room, uninterrupted work time, students choosing their work independently, individual contracts for each student, use of the Montessori cosmic curriculum (core centered in the areas of history, geography, and science), elementary students coming from Montessori preprimary classrooms, and use of report cards modified for Montessori schools.

Based on the findings, Montessori principals would have a schedule worked out so visitors would be invited to different rooms on different days and not restrict visitations to only a few selected classrooms. Also inservice training could be limited for teachers, but teachers would play an active part in evening training workshops for parents and others in the

community who want to know more about the Montessori method of education.

A course of study or article based on the findings could be developed in order to provide valuable information to principals in Montessori schools or those principals transferring into Montessori schools.

Future Research

This study was a micro analysis of how fifty-four teachers in three public Montessori schools described their Montessori principals as instructional leaders. Transactional leadership and transformational leadership theories were used to better inform the reader's understanding of the findings. There is a need for further research to be conducted relative to a more universal description of Montessori principals' practices as instructional leaders from the teachers perspective. A national survey could be sent out to gather further data from Montessori public school teachers throughout the United States, perhaps shaped by the data from this study.

Montessori teachers in public schools were used in this study. Private Montessori schools could also be involved in research about the practices of Montessori principals as instructional leaders from the teachers' perspectives. The same national survey could be used with teachers in both private and public Montessori schools.

Additional research is needed on the role of staff development in Montessori schools. Literature and current research (Hannay & Stevens, 1984; Daresh & Liu, 1985; Liu, 1984; Hansen & Smith, 1989; Sparks, 1992A; Prickett, Richardson, Short, & Lane, 1990) expressed how important staff development is in the practice of instructional leadership; however, the Montessori teachers in this study described very few examples of staff development for teachers. The emphasis, rather, was on parent training. Future research could investigate specifically the extent to which Montessori principals as instructional leaders provide or should provide staff development.

The instructional leadership practices of Montessori public school principals have been explored, but there have been some limitations to this study which might be avoided in future studies. Only the perceptions of the teachers were utilized to determine the principals' instructional leadership practices--a further limiting factor. Future research could include an examination of the principals at the three Montessori schools used in this study. Understanding how these Montessori principals view their own communication techniques, shared responsibilities, preserving and supporting the Montessori program, and school procedures could be included in future research.

In addition, a study of Montessori principals throughout the United States could be conducted to find out how they practice instructional leadership. This area of study is still very new and offers a rich opportunity for future research.

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APPENDIX A
INVENTORY OF INSTRUCTIONAL LEADERSHIP
PRACTICES OF MONTESSORI PRINCIPALS

Name _____

The purpose of this study is to identify the instructional leadership practices of Montessori principals. The findings will be used to assist in the development of Montessori principal preparation programs in colleges or universities and/or to assist in the development of workshops and/or seminars for strengthening the administrative practices of Montessori principals. This information would also be useful to practitioners as they learn how their Montessori colleagues deal with jobs (responsibilities) in situations similar to theirs. Your help in completing this questionnaire would greatly assist the purpose of this study, and I would be most grateful for your assistance. A copy of the completed study will be made available to you through your principal.

For this research the definition selected for "instructional leadership" is from Smith and Andrews (1989):

(1) Providing the necessary resources so that the school's academic goals can be achieved; (2) Possessing knowledge and skill in curriculum and instructional matters so that teachers perceive that their interaction with the principal leads to improved instructional practice; (3) Being a skilled communicator in one-on-one, small, and large-group settings; (4) Being a visionary who is out and around creating a visible presence for staff, students, and parents at both the physical and philosophical levels concerning what the school is all about.

Most Difficult Instructional Leadership Job (Responsibility)
for Your Montessori Principal

Please describe what you think is your principal's MOST DIFFICULT job (responsibility) as an instructional leader as related to the Montessori program?

Please describe the TYPICAL WAY your principal deals with this type of job (responsibility).

Give an example of how your principal DEALS WITH this type of job (responsibility).

Please rate the EFFECTIVENESS of this method of dealing with this type of problem.

low

high

1

2

3

4

5

Most Frequent Instructional Leadership Job (Responsibility)
for Your Montessori Principal

Please describe what you think is your principal's MOST FREQUENT job (responsibility) as an instructional leader as related to the Montessori program?

Please describe the TYPICAL WAY your principal deals with this type of job (responsibility).

Give an example of how your principal DEALS WITH with this type of job (responsibility).

Please rate the EFFECTIVENESS of this method of dealing with this type of problem.

low

high

1

2

3

4

5

APPENDIX B

LETTERS TO TEACHERS ABOUT THE PROJECT

Dear Teacher and Montessori Friend,

I have been talking to the three Montessori principals in your school district including your principal (put in principal's name) about a project I am planning to do in your schools with your permission.

I am new to (name of city) and new to Xavier University as Assistant Professor in Montessori Education. Because I am coordinating the Xavier elementary interns, I have had many opportunities to visit the local Montessori schools, which I am thoroughly enjoying.

I am asking for your help with a project which is part of my dissertation plan for Texas Tech University. The purpose of my project is to get information from Montessori teachers in public schools about ways instructional leadership is valuable to you, which will help me develop a program for other professionals wanting to become Montessori principals.

The actual project involves:

(1) Asking you to answer two questions with three parts each during your (date) staff meeting (time). In my pilot project it took Montessori teachers about 20 minutes to do this. I will ask for your names, but everything will be kept confidential. At this staff meeting time I will share my twenty page Bloom's Taxonomy command card information with each of you as a gift of appreciation. (Your principal has a copy of the Bloom's Taxonomy in the office if you would like to look at it.)

(2) After I review your questionnaire responses, I will ask a few teachers to meet with me one more time for 30 minutes in order to ask you personal responses to your original answers. (I will gather a group of teachers with their permission into a focus group, or I will ask a few teachers to meet with me individually.) If you're in a focus group, you will not be asked to meet individually.

I sincerely hope you will participate in this project. The Montessori movement in education needs more research, and this project will be strengthened by your participation.

Please fill out the attached permission form today (or as soon as possible) and return it to (name of principal) so I will know how many teachers will be participating.

Thank you in advance for your willingness to help. If you have any questions feel free to phone me at (included phone numbers here).

Sincerely,

Ginger McKenzie

APPENDIX C

TEACHER'S PERMISSION FORM FOR QUESTIONNAIRE

Please respond to the following statement and turn in to your principal today.

I _____ (agree, do not agree) to
Please print name Circle one

participate in filling out the questionnaire at a regular scheduled staff meeting _____. The questionnaire has been developed by Ginger McKenzie for a research project to identify ways instructional leadership is valuable to each teacher at your Montessori school. It will take about 20 minutes to fill out the answers to the open-ended questionnaire.

I realize that my name will be asked for on the questionnaire, but only for the purpose of identifying which teachers will be invited to participate later in one additional meeting, if the teacher agrees to meet one more time for 30 minutes. Then the names will be removed and all participant names will be kept anonymous.

As a token of my appreciation to all the teachers willing to help with this project, I will be giving a copy of my twenty page Bloom's Taxonomy command card information to each teacher during the same meeting time._____

Signature of Teacher

APPENDIX D

QUESTIONS FOR FOCUS

GROUP CMES

CMES Focus Group Questions Thursday Feb.18, 1993, 8:45-9:30 am

From the teachers responses on the IILPMP questionnaires, topics were identified, and descriptive data were listed under each topic.

During the focus group at CMES, the major topics were discussed informally and the teachers were told that their names would not be included. The Focus Group interview was transcribed. The Focus Group discussed: (1) Instructional leadership practiced through clarifying and educating parents and community about the Montessori program. (2) Instructional leadership practiced through communication with teachers.

Focus Group - CMES School: The questions asked by the researcher during the focus group interview are in parentheses.

I. Instructional leadership practiced through clarifying and educating parents and community about

A. Our Montessori Program (not "different" and yet

"different") Some of the methods used:

(1) Parent meetings and workshops like Parent

Education Night, Open House, Brotherhood

Banquet (One person said: "This promotes good relations but not what Montessori is about in our classrooms". Could someone respond to this?)

- (2) Teachers encouraged to invite parents to observe in our classrooms, (Would someone expand on this?)
- (3) Staff encouraged to be involved in building and district meetings, (Are these meetings in the district with all elementary teachers in the district or just the other two Montessori schools?)
- (4) Newsletters to parents, (How are these put together and how do they cover Montessori issues?)
- (5) Someone made a suggestions - What do they think? "Requiring all parents selecting any alternative program to attend a series of

meetings to inform them of information about the program."

B. Expectation of the children including: discipline, completing their assignments/homework, respecting others, (Are these expectations different in the Montessori environment than other places you've taught? Maybe some of your many years of experience can help us reflect on this issue.)

(1) Observations are made of the children and, if necessary, conferences between the principal and the student are given. Example: child might be asked to write a paper about his/her behavior,

(2) Talk to teacher about the child,

(3) Talk to parents about their children, (Is this practice frequent and effective - comments or open discussion?)

(4) Principal goes into classrooms and is very visible throughout the building, (Are these methods any different in a non-Montessori environment for those of you who have had both experiences?)

II. Instructional leadership practiced through communication with teachers.

- A. Staff memos,
- B. Communicating directly to teachers,
- C. Staff meetings - example one teacher listed-"during staff meeting we discuss and quote our idea", (Do these quotes pertain to Montessori instruction?)
- D. Monitoring the implementation of the Montessori program by visiting classrooms-giving praise, encouragement, suggestions, (What type of communication is given for this purpose? Written, verbal? Which happens more frequently "encouragement or suggestions for improvement"?)

E. Workshop for teachers about topics of interest like positive discipline, (Do these workshops include Montessori curriculum topics? Are these on a regular basis, could they share some that were most helpful, do they go to professional meetings off campus too? Are these meetings paid for? Are there follow-up sessions for these meetings?)

APPENDIX E

QUESTIONS FOR FOCUS

GROUPS A AND B NMES

NMES Focus Group A Questions Tuesday April 13, 1993, 2:15-2:45 pm

NMES Focus Group B Questions Friday April 16, 1993, 2:15-2:45 pm

From the teachers' responses on the IILPMP questionnaires, topics were identified and under each topic descriptive data were listed. Because there were two focus groups, the following code was used: p. 2, 17 means the descriptive data came from "p. 2" of the list made from all the descriptive data responses, and "17" means it came off the 17th questionnaire handed in during the time the questionnaires were answered.

During the focus group A interview at NMES School, two points of interest were discussed informally, and the teachers were told their names would not be included. The Focus Group A discussed: (1) Instructional leadership practiced in dealing with and supporting a diverse school community (students, staff, and parents). (2) Instructional leadership practiced through being a skilled communicator. These interviews were transcribed.

Focus Group "A" - NMES School: including seven teachers: The questions asked by the researcher during the focus group interviews are in parentheses.

1. Instructional leadership practiced through dealing and supporting a diverse school community (students, staff, and parents)

A. Supporting each teacher as an individual (p.1,14),

lets teachers develop their own style of teaching the Montessori curriculum (p.1, 6, 1,2,3,5,7,4,9).

Examples: relies on teacher input on Montessori curriculum matters (p.2,11), observes in classroom (p.2,8), participates in staff group meetings (p.2,1).

(Can someone or several of you explain in more detail how he supports each teacher as an individual and how you feel about this?)

B. Bringing factions together when dealing with

students, staff and/or parents—these can be external or internal concerns or expectations

(p.1,7). (Can anyone expand or explain how he

brings factions together whether student factions, staff factions or parent factions?)

2. Instructional leadership practiced through being a skilled communicator

- A. It was stated that your principal is a skilled communicator and works well with parents, students, and staff-Examples: compliments teachers and students, encourages teachers (p.5,2) listens and studies and reflects before making decisions. (Can several of you discuss how you have experienced your principal as a skilled communicator?)
- B. Counseling both parents and students-Example: tries to divide students evenly for Montessori class assignments (p.5,15). (How does this work? Since you have students for three years, do you ever need to change class assignments during that time?)
- C. Looks for the best in each teacher and turns problems over to teachers to empower you to help solve problems (p.2, 14). (Can some of you explain how your principal does this?)

During the focus group B interview at NMES two topics of interest were discussed informally, and the teachers were told their names would not be included. The Focus Group interview was transcribed. The Focus Group B discussed: (1) Instructional leadership practiced through preserving and supporting the Montessori program and teachers. (2) Instructional leadership job/responsibilities as it relates to dealing with discipline.

Focus Group B NMES : Including four teachers. The questions asked by the researcher during the focus group interview are in parentheses.

1. Instructional Leadership practiced through preserving and supporting the Montessori program and teachers

A. Maintaining goals of the Montessori program by

allowing trained teachers to implement the Montessori program fully (p.1,18) Examples:

(1) Evening program "A Silent Journey"-traveling

through all 3 levels and then observing, (Does this

mean observing in the classroom? Can someone

discuss how this program works? What percentage

of the parents come?)

(2) Preserve the educational aims of Montessori

so central office downtown doesn't restrict or change

our program (p.1,16). Example: Keeping in contact with decision makers, keeping parents involved p.2,10; keeping I.A.'s for our classrooms p.3,10; Supports letters from the teachers about standardized tests and report cards p.3,16. (Could someone explain these examples in more detail or give other examples and how successful they are for you?)

- (3) Solving concerns of parents and other people—so teachers can put energy into teaching (p.4,10).
Example: Listen to what teachers say and getting back to teachers with help or suggestions. (Can you give other examples of how your principal helps you to put your energy into teaching?)

2. Instructional leadership job/responsibilities as it relates to dealing with discipline:

A. Discipline concerns Examples:

- (1) Dealing with children (p.4, 9,3,13) like discussing with students how to solve their disruptive behavior

(p.5,9); "Fuss Busters" program to help solve problems (p.5,13); Direct children who make ethnic slurs (p.6,9) to do research about the culture involved, (Can someone expand on Fuss Busters or any program used?)

- (2) Discipline concerns-involving parents, children, teacher and principal (p.4, 18,3, p. 5, 18); (When do the parents get involved?) Set up rules for all groups-parent committees, students (p.5, 17, 19), (Are the rules set up by parent committees and students, or are these committees only for supporting the rules? Do you have any other comments about how your principals take on their responsibilities as instructional leader in your Montessori school?)

APPENDIX F

QUESTIONS FOR FOCUS

GROUPS A AND B SMES

SMES Focus Group A Questions Monday March 8, 1993, 3:30-4:00 pm

SMES Focus Group B Questions Monday March 8, 1993, 4:00-4:30 pm

From the teachers responses on the IIPMP questionnaires, topics were identified and under each topic descriptive data were listed. Because there were two focus groups, the following code was used: p. 1, 14 means the descriptive data came from "page 1" of the list made from all the descriptive data responses, and "14" means it came off the 14th questionnaire handed in during the time the questionnaires were answered.

During the focus group A interview at SMES two points of interest were discussed informally, and the teachers were told their names would not be included. The Focus Group A discussed: (1) Dealing with and educating parents and (2) Supporting and explaining the Montessori program and curriculum

Focus Group "A"-SMES School: Including five teachers:

The questions asked by the researcher during the focus group interviews are in parentheses.

1. Instructional leadership practiced through dealing with and education of parents, community, and

"downtown" about what our program is all about.

A. Explaining to the district how the Montessori program compares with the public school (p.5,22; p.5,11; p.5,19; p.2,23; p.1,23; p.1&2,3; p.1,16; p.3&2,2; p.2,27).

(1) Example: Teachers got together and developed a report to present to the district about how the districts' assessment criteria doesn't fit their Montessori school. (Can someone or several of you comment on this process?)

(2) Example: Teachers created a Montessori language curriculum to help "the teachers be leaders concerning curriculum", "Agreeable to our doing 'our thing' as we correlated Montessor curriculum with district's curriculum", (Can someone

discuss further how this happens and how you feel about it?)

B. Supporting and explaining the Montessori

program and curriculum to parents & community

(1) "Takes all points of view and then does what is best for the whole program"

(p.3,9),

(2) "Supports teachers when talking to parents about student problems or misunderstandings about Montessori program and student expectations"

(p.2,14; p.2,13;p.1,11; p.1,29). (Can you discuss this procedure?)

(3) Parent nights–faculty teams address age appropriate Montessori curriculum (p.5,3;

p.2,11; p.1,4; p.,10). (Are these meetings

required? If no, would you like for them to be required?)

- (4) Conferences called-parents are expected (p.3,20;p.3,14). (How successful do they see this method?)
- (5) Explaining Montessori to the community (p.3,10,9; p.1,25).
- (6) Helping with transition process from K to 6-9, to 9-12 (p6,18; p1,17).
- (7) Parent relations, public relations, dealing with difficult parents (p.5,3, p.5,4;p.5,25,p.2,13). (This topic did get mentioned a great deal. What do you see as the biggest concern with parents. Do you have suggestions for this concern?)
- (8) Ambassador for Montessori program, tours (p.2,25).
- (9) Monthly parent committee meetings (p.6,10).

- (10) Inform parents & enlist parents to go to board meetings. (Can they explain or comment about this? How is it done- phoning, person to person, etc.?)

During the focus group B interview at SMES two topics of interest were discussed informally, and the teachers were told their names would not be included. The Focus Group interview was transcribed. The Focus Group B discussed: (1) Open communication, and (2) Staff support.

Focus Group B SMES: Including eight teachers. The questions asked by the researcher during the focus group interview are in parentheses.

1. Instructional Leadership Practiced through open communication with staff and staff support

A. Open Communication (p.2,17; p.2,19; p.2,1; p.2,5; p.2,8),

(1) Showing teachers that their problems and

ideas are important-examples (p.2,8) -

"listens to all and then makes decisions",

"open to input" (p.2,5). (Can someone

explain how this happens and are there examples that relate specifically to Montessori?), Supports teachers (p.2, 25; p.2,7; p.2,1; p.2,20); example-(p.2,25) good listener; (p.2,7) supports teachers; trusts teachers and supportive (p.2,19); "makes teachers feel worthwhile" (p.2,21). (Can someone give an example of how their principals make them feel worthwhile or feel trusted?)

Open door policy-how does this work and does it help?)

- (2) Team leader meetings-so all teachers know what is happening at all levels.

(Can you explain to me how this works?)

- (3) Effective communication (p.2,21; p.2,5); "effective communicator", "communicates with kindness" (p.2,7;p.2,12); "good listener" (p.5,1;p.15,8;p.5,28;

p.5,12; p.5,16). (This was a very frequent response, can someone give an example or make a comment about your principal's "good listening" skills?)

- (4) Updates staff at staff meetings about Public School. (Can someone expand on this practice?)

B. Instructional leadership practiced through staff support

- (1) "Treats staff as quality professionals" (p5.,9).
- (2) "Supports special events and programs" (p.5,7).
- (3) "Has visitors visit different classrooms" (p.5,7). (During visits what procedures are followed? Ex. Do you have visitors watch, do they walk through classroom and ask questions or do you demonstrate?)

- (4) Helps teachers with discipline problems (p.5,21,13). (Are the discipline problems and support by your principals any different because of the Montessori program? Can someone comment on this?)
- (5) "Letting teachers determine some rules" (p.3,6;p.5,23; p.3,1,7,8,17); "allows staff to discuss & then takes on their suggestions" (p.3,1); "gets input from teachers, staff and other sources before making decisions" (p.3,6) "teachers come up with an alternative" (p.3,7) "builds on a consensus from all involved" (p.3,8). (Do any of these teacher directed decisions deal with Montessori concerns or do they simple exist across the entire program in a general way?)

APPENDIX G

QUESTIONS FOR INDIVIDUAL

INTERVIEW CMES

CMES Individual Interview Questions J.N.C. Feb. 26, 1993, 8:45-9:15a.m. In parentheses are the questions asked by the researcher during the individual interview.

(1) Most difficult job/responsibility—"for this program is educating parents. Many parents within our population look at this program as an "alternative" or "better" choice than the traditional Public School. The majority do not appear to truly educate themselves as to what the Montessori philosophy is, nor do they actively seek education once their child is enrolled."
(Do you see this situation getting worse or is it about the same over the past several years since you have been here?)

(2) Typical way it's handled - "Often, everything runs smoothly until a child is recognized as having difficulty. Then parents approach the situation from the viewpoint of Montessori being "different". My child doesn't understand, or I (parent) do not understand what is expected. This is handled through parent/teacher/administrator conferences. But it is frustrating

that appropriate education is not sought before a crisis comes about." (Has she seen this as a growing problem?)

(3) Give an example - "The principal will discuss philosophy at various parent meetings (Open House, etc.) She addresses the issues with staff and encourages open discussion through conferences." (Conferences just with staff individually, or as a group?) (Have ideas been discussed to solve this? You use the words "she encourages open discussion" seems like this would help. Has it?)

"I would like the district to place a requirement on parents selecting any alternative program to attend a series of meetings to inform them of such information." (Has this ever come up in discussion, does she see the district doing this?)

(4) Most frequent "responsibility as an instructional leader has been discipline of both students and faculty. Building a program is no small thing. Students are learning to live in peace and work through cooperation. The faculty is learning to balance and modify great work loads and old habits. They are also beginning to look at the whole rather than individual parts

(classroom)." (Does she see the balance between great work loads and old habits pertaining to Montessori responsibilities vs. general expectations?)

(5) Typical way principal deals with this - "the principal supports staff in developing positive discipline through training and staff meetings. She talks to students individually who have persistent problems." (You ranked the effectiveness of this low "2". Is there a reason why this isn't helping more? When do parents get involved and does that help or does lack of understanding, as you mentioned on page 2, keep the parent involvement limited and not very supportive?)

(6) Give an example--"Students may be given written assignments to help them reflect on their actions, or responsibilities around the school to encourage ownership and belonging." (Does the staff feel a sense of ownership also?)

"Staff is encouraged to be involved at all levels--building and district--with representation from K, 6-9, 9-12. Sometimes this leads to over extension and results in the same people

doing everything, or no one doing anything." (Will she please explain this?)

APPENDIX H

QUESTIONS FOR INDIVIDUAL

INTERVIEWS NMES

NMES Individual Interview Questions #1 AFNA March 11, 1993, 2:15-2:45 In parentheses are the questions asked by the researcher during the individual interview.

(1) MOST DIFFICULT JOB/RESPONSIBILITY of your principals as instructional leaders as related to the Montessori program. "As I see it the most difficult job for our principal is as a communicator because he has so many individuals and groups to relate to during the day (evenings included). Our school community is a very diverse and active one, and the principal needs to be working with all the sub groups, individuals, etc., that exist."

(2) Typical way your principal deals with these jobs—"He leads groups, listens, synthesizes and usually the group or individual comes out of the meeting feeling that they, or he/she, participated and had a part in coming to a decision. He is not necessarily the chairperson of a convening group, but he is an active component of it always. Also he is not one to act

immediately, but usually when he does, I have the impression he has thought it out." (After he has thought it out how does he communicate the results-more talking person to person, notes, etc.? Do any of these decisions and discussions pertain to the Montessori methods of teaching, discipline procedures used in your Montessori classrooms, etc.?)

(3) Example: "He meets monthly with TBC. At this meeting (TBC meets bimonthly) TBC members discuss concerns that have been brought up previously. At this meeting we try to resolve problems, etc. He is informative, gives us background we need to know and states his opinion. He also summarizes our discussion (synthesizes). He, unlike some principals, is not threatened if TBC does not agree with him. It makes for open discussion and resolution." (She has explained a great deal but could she take it further - I do need to know what TBC stands for? Since the members of this group are trying to resolve problems, is your principal like a mediator?)

(4) Most Frequent job/responsibility - "I'm not sure. I would say that helping the school get its resources and someone

who is out and about creating a visible presence for staff, students, and community.”

(5) Typical Way of dealing with this responsibility - “He helps the school get extra resources by working with our school Foundation. (It raises money for our school). He also encourages parents who want to work with the school—bringing in special cultural programs, writing grants, etc.”

“He is very visible - the children know him and vice-versa. The parents work closely with him and he is always available to the staff.” (Does he meet with the School Foundation Group? Who plans and sends out notices about their meetings? Do parents write a lot of grants? Does he have an “open door” policy so you feel free coming to him?)

(6) Give an Example - “Available to staff—I have had a problem with my I.A. I have talked several times to him over the past nine months. I didn't think he was listening. However, two months ago, we had a very good meeting and the resolution appears in sight. I was very impressed with the way he handled it. (Please note I felt he was available and my problem would

be handled with confidentiality.)" (Do you want to say any more about this situation?)

NMES Individual Interview Questions #2 GWNA March 18, 1993
2:15-2:45 pm. The questions asked by the researcher during the individual interview are in parentheses.

(1) Most difficult job/responsibility of your principal as instructional leader as related to the Montessori program.

"I believe it's representing the Montessori philosophy and educational form to the parents of our particular school and to the district as a whole. Our principal needs to preserve the intent and educational aims of Montessori philosophy so the greater system doesn't 'bastardize' the system." (Can she explain this in more detail?)

(2) The typical way your principal deals with this job.
"Our principal stands behind the position the teachers take and trusts in their attempts to maintain the philosophy and educational modes." (How does your principal show "trust" toward the teachers, can she think of examples?)

(3) Give an example: "The principal supports letters drafted by the teachers trying to elucidate the philosophical positions as to standardized testing or report cards." (Can she explain what this is about, and is there a reason that she identified the effectiveness of this first section as 3 out of 5?)

(4) The most frequent job/responsibility of her principal as instructional leader. "Our administrator often finds himself as a mediator between the other two public school Montessori programs. Trying to get some agreement or position Montessori as a whole can represent." (Could she explain this? Is this something that has been going on for a long time or is it something new to the Montessori public community?)

(5) The typical way your principal deals with this responsibility is by "attending many meetings". (Is she speaking of meetings between the other Montessori principals, or other types of meetings? If other types, who attends, how often, what seems to be the concern?)

(6) Example: "report cards-attends meetings". (Are there other examples? Is there a reason she ranked 2 out of 5 on this part of the questionnaire? Are there other points she would like to bring up?)

NMES Individual Interview Questions #3 RRNA March 10, 1993, 2:30-3:15 pm. The questions asked by the researcher during the individual interview are in parentheses.

(1) Most Difficult job/responsibility of your principal as instructional leader-(expressed in two parts) (a) "One of the most difficult jobs is to be caught in the middle between the satisfaction of community, parents' wishes and the needs and wishes of his staff. (b) Second, principals see mainly disruptive pupils more often than the quiet mannerly ones."

(2) Typical way your principal deals with these responsibilities: "Our principal is very effective. He has great communication skills. This helps him deal well with his staff and community. He backs his teachers and gives positive feedback."

(Could you give me more information about his communication skills and maybe an example? Any examples that are specific to how he handles his communication in respect to the Montessori school environment.)

(3) Give an example: "He has a way with group discipline. Our school has whole group programs where the discipline is outstanding. Students are expected to show respect at all times. He is one of the best administrators I've ever worked with."

(Could you explain more about the "group discipline" procedures. You also used the words "worked with". Is that identifying a sharing environment where what you have to say is important and used in planning?)

(4) Most Frequent job/responsibility as an instructional leader as related to the Montessori program. "Dealing with problem children and problem parents. We are getting fewer and fewer of both."

(Is there a reason you feel that you are getting fewer and fewer problem children and parents?)

(5) Typical Way your principals deal with these problem children or problem parents. "1. Defining the rules and expectations to the child and parent. 2. Consequences if rules are broken. 3. Ways to alter the behaviors. 4. Fuss Busters program for children to learn to solve own problems. 5. Problem children—take Fuss Buster Program. 6. Counseling." (What are some of the ways used to alter behaviors, and can she explain the "Fuss Busters" program? In #6 are you speaking of counseling with a professional that stays on your campus or other professionals who come to your campus?)

(6) Give an example: "Constantly working to help improve a program situation, more counseling for the student, parents contacted again."

(Is family counseling offered? How is the program situation improved?)

APPENDIX I
QUESTIONS FOR INDIVIDUAL
INTERVIEWS SMES

SMES Individual Interview Questions #1 D.G.S. Feb. 18, 1993,
3:45-4:15 pm. The questions asked by the researcher during the
Individual Interview are in parentheses.

(1) Most Difficult Job/responsibility of your principal as
Instructional leader—"running interference with the downtown
administration so teachers can teach in a Montessori
environment. This includes: (a) keeping funding in place and
increased when possible, (b) keeping instructional assistance in
the budget, (c) preventing imposed curriculum or tests that run
contrary to the Montessori method and curriculum." (Does he
see all of these as equally difficult for his principal to deal
with?)

(2) Typical way it's handled - (a) "Enlist parents or make
sure parent groups are informed and present at budgetary board
meetings -parent voices are heard more clearly than
administrators or teachers." (How does your principal go about
informing parents - notices, phone calls, on campus meetings?)

(b) "Support tax addition, get teachers and students to demonstrate in many ways." (Could he explain this?)

(c) Have news media informed of activities at school so we can get good press. (How often, and what type of media coverage happens most often?) (d) Relate comparative cost of one program to another so "myths" like our Montessori program is very expensive is understood correctly. (Does this involve teachers and administrators working together?) (e) Currently compiling list of problems with tests which teachers support through committee work. Could he explain?

(3) Give an example: "Levy - stand on top of school with large banners in cold, freezing, weather so Interstate commuters see signs to vote for School Tax Levy." (When did they do this?)

(4) You described your principal's most frequent job/responsibility as an instructional leader as related to the Montessori program as-- "problem solving" in many different areas: teacher-student, teacher-parent, teacher-teacher, parent-parent, teacher-instructional assistant (I.A.), I.A.-

student---then you put: listen, listen, listen, then respond."
(Could he explain his list, and what he means by "listen." Are
all groups equal?)

(5) Typical way your principal deals with "problem
solving:" "Individually, then sending memos as to rules,
expressing rules in teacher meetings, letting teacher determine
some rules, final step is setting the limit drawing the line of
what is and what is not acceptable. (This sounds like your
principal is very clear about expectations once the process has
been followed which includes teacher input--is this correct?
Could he explain "letting teachers determine some rules"?)

(6) Give an example - (a) Problem with students who do
not do assigned work, and (b) Lets teachers create recess time
detention program and run it. (Is this something new? How did
it come about? Has it been helpful? Does he have anything
further he would like to comment on?) Thank him for his help
and willingness to meet.

SMES Individual Interview Questions #2 GAGS Feb. 12, 1993
3:45-4:15 pm. The questions asked by the researcher during the individual interview are in parentheses.

(1) Most difficult job/responsibility for your principal as Instructional leader - "The job most difficult is involving our parents of low achieving students to help with the job of training/educating their children." (Can you expand on this concern?)

(2) Typical way your principal deals with this - "When there is a problem, the parents, psychologist and teachers are used to help parents."

(3) Give an Example - "Child refuses to do any work, child is referred to office and the mother is immediately contacted, after a talk with the mother, the principal sends mother and child back to the art studio so mom can help child get started on her work." (You marked this method as a 5 or high methods of dealing with this type of problem. Do you find the principal involved enough? Under "typical way" you hadn't mentioned the principal so I wanted to clarify your answer to make sure I understood what you were saying.)

(4) Most frequent job/responsibility: "The principal deals with (a) problem children and (b) all school routines such as buses, lunchroom, report cards, reports to the central office."

(5) Typical way your principal deals with this responsibility: "The child sent to the office after the classroom Montessorian has handled the problem as far as she/he can. That means the teacher has used her discipline plan, called the parents or has had conferences about the problem, and it still needs attention. (Sounds like you may contact the parent yourself, then if it doesn't help, the principal will get involved and include the parent again?)"

(6) Give an example: "A child is not working. The parents are informed and child is given suspended study sessions to complete the work. (What time of day and how does this work?) If the plan that was agreed upon by the teacher and parent is not working, the problem is referred to the principal for further work. The principal has access to further help that can be given to the family. (Can you explain what help is available, is this available to all public school children? You

Rated this method 5 or high, do you have other ideas for handling these situations or ways to prevent them?)

(7) On back side of page 1 she said "I feel very strongly that as an administrator of a Montessori School the principals need to know the curriculum, philosophy, and methods well enough so that their ideas are not in conflict with those working in classrooms. Not all the equipment in my classroom belongs to the school, yet I have been told that everything belongs to the school unless I can prove that it doesn't. People trained to make materials will know and feel differently about this. How can they work to build the school's equipment if they don't know what is needed? (Could you discuss this in more detail, are you dealing with this problem at the present time?)

SMES Individual Interview Questions #3 BMS Feb. 12, 1993, 1:35-2:15 pm. The questions asked by the researcher during the individual interview are in parentheses.

You made some interesting comments and I was anxious to visit with you further about how you see your principals practicing instructional leadership.

(1) Difficult job/responsibilities - dealing with outside world's concept of what we are all about -- this problem originates with parents, community: Example (a) "Sees us as elite or some people expect miracles even with those children with behavior and emotional problems." (Can you explain this to me in more detail?) (b) Example: "My child is smarter, the teacher needs to spend more time with my child--not the slower students." (How do the parents bring this to your attention?)

(2) Typical way principal deals with this. "Our principal takes out of our hands certain responsibilities, if it is helpful to us, and, then, informs us of the results." (I interpreted your response to say that teachers are helped by your principals. Is this what you meant?)

(3) Example: "Students are transferred out of my room if the child is disruptive, which is very important since we have them for 3 years." (Can you explain more about this? Do you have other ideas of how to deal with these outside world misconceptions?)

(4) Most frequent job/responsibility: "To provide us with less paper/busy work." (In which areas of your responsibilities does this happen, maybe different from other principals you have had?)

(5) Typical way your principal deals with this responsibility: "Shifts trivial matters, limits staff meetings, stays on task during staff meetings." (Can you expand on this topic?)

(6) Example: "Limits staff meetings, stays on task, does not let us run-away with our own personal gripes." (How does this help and benefit you over all feelings about your teaching? Is this something that is specific to a Montessori environment? If "yes", in what ways?) (Do you have ideas of how to deal in

other ways with this job/ responsibility that your principals have not used (like keeping you on task or with less busy work?)

APPENDIX J

NMES REVIEW OF QUESTIONNAIRES TO DEVELOP FOCUS GROUPS AND INDIVIDUAL INTERVIEWS

After making the list of all the responses, the next step was making the list of how many teachers and which teachers answered the same way to the general topics discovered from the answers to the questionnaires.

Focus Group A Participants
A. Dealing & Supporting Diverse
School Community (students,
staff, parents)
B. Skilled Communicator

Focus Group B Participants
A. Preserve & Support
Montessori Program
B. Dealing with Discipline

x	1	x	23 Ind. interview 8 yrs.
xxx	2	x	
xx	3	x	
xx	4	x	
xx	5	x	
x	6	xx	
x	7		
x	8	xx	
x	9	xx	
	10	xx	
xx	11	x	
x	12	xx	
	13	xx	Ind. Interview 23 yrs 8 M.
x	14		
	15	xx	
	16	xx	Ind. Interview 11 yrs Mont.
x	17	xx	
x	18	xx	
	19	xx	

Focus Group A #1-2,3,4,5,7,11,14

Focus Group B #2-6,8,9,10,12,15,17,18,19

Ind. Interviews - 1,13,16

APPENDIX K

SMES REVIEW OF QUESTIONNAIRES TO DEVELOP
FOCUS GROUPS AND INDIVIDUAL INTERVIEWS

Focus Group A Participants	Focus Group B Participants
2,3,4,9,10,11,13,14,17,22,23,24,25	1,5,6,7,8,12,16,18,19,20,21,
A. Dealing with & Educating Parents	27,28,29
B. Supporting & Explaining the	A. Open Communication
Montessori program & curriculum	B. Staff Support

	1 xxx
xx	2 x
xxxx	3
xx	4
	5 xx
	6 x
x	7 xxxx
	8 xx
xx	9
xxxx	10 x
xxx	11
	12 xx
xxx	13 x
xx	14
	16 x
x	17 x
x	18 xx
x	19 xx
xx	20 xx
x	21 xx
x	22 x
xxx	23 x
x	24 x
xxx	25 x
	27 x
	28 x
x	29 x