## The Essential Elements for Montessori in the Public Sector: Implementation Considerations for COVID-19

In May 2020, NCMPS announced a six-week Looking Ahead Workshop "to dig deeper into the details of reopening for public Montessori schools". Weekly new cases of COVID-19 had dropped to 156,000, the lowest rate since early April, and we were cautiously optimistic about the weeks and months ahead.

By the fifth week of the Workshop, weekly new cases had exceeded 300,000 and we were contemplating the reality of returning to school with strict safety measures in place or, perhaps, not returning at all. The Looking Ahead Workshop brought together more than 40 educators with the goal of sharing ideas and resources for adapting to these new and still-changing conditions. NCMPS framed the conversation around the 25 standards characterizing high fidelity implementation as articulated in its Essential Elements Rubric for Montessori in the Public Sector (EER)[1]. Rather than delving too deeply into the specifics of classroom dimensions and online learning platforms, we worked to stay focused on the developmental principles underlying Montessori education. The considerations embedded in the rubric below are a distillation of those conversations. Throughout the Looking Ahead Workshop, the participants centered their work in Developmental Education, following a process of Observe, Assess, Adapt, Connect. We recommend that you consider a similar approach as you take on the challenges of remote, in-person or hybrid teaching.
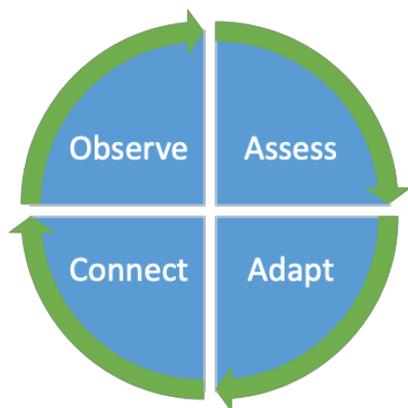


**Observe**—Note challenges as they arise.

**Assess**—Reflect on these challenges and how they present themselves in the school, classrooms, and/or home environments. Create tailored action steps to meet the needs presented by the challenges.

**Adapt**—Use the action steps to transform and redesign the prepared learning environments and/or learning opportunities.

**Connect**—Present your adaptations to the impacted adults and/or children so they can reconnect with the work.

**Repeat** - Observe how the adaptations are working. You may need to go through the process again to address the same challenge, or it may be solved and you are able to move on to something else.

Despite the modifications which may naturally occur within the standards of the five domains of the Essential Elements Rubric as schools move to remote, physically distanced in-person, and hybrid models, the EER continues to articulate nationally recognized standards of Montessori quality. We encourage you to continue to use the EER as a tool to guide your design thinking and implementation strategies as you continue to adapt to these unusual circumstances.

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[1] This document is based on consensus work by major national organizations over the past 25 years.

## General Community Considerations

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| **Stress and Trauma** | The stress and trauma experienced throughout the COVID-19 pandemic should be taken into consideration for children, families and school staff.<br>• Focus on social justice, and engage with the reality of the civil rights protests and conversations prominent in our national discourse as well as the disproportionate impact of COVID-19 on BIPOC and low-income populations.<br>• Check in with families directly affected by structural inequity, and provide direct support (such as food, transportation, technology, and emotional support.)<br>• Focus on social interactions, including relationship building with every family and trauma-informed teaching practices.<br>• Before children and families return to school, in-person or remote, provide teachers with professional development in these areas and begin offering social-emotional support before school starts with online orientation activities.<br>• Recognize and prioritize social-emotional needs of children, families and school staff in the first days and weeks of the school year. |
| **Physical Safety** | The health and safety of the school community is at the forefront of staff and family's minds as they reenter the school year. These plans will be unique to each school based on state and local public health requirements.<br>• Include and engage families from the start, including surveys, virtual listening sessions, and outdoor, physically-distant group gatherings.<br>• Provide as much clear and detailed information as possible regarding all aspects/protocols/elements of remote, hybrid and in-person learning.<br>• Follow state and local public health guidelines and clearly link school policies to these guidelines. Keep protocols consistent across grade levels and/or classrooms as appropriate. Be prepared for all scenarios: full closure, partial re-opening, and full reopening with restrictions. Also prepare for changes to happen quickly, especially for a move from in-person to remote. For in-person, develop clear, workable guidelines for sanitizing classrooms and materials and distancing. |
| **Access to Technology** | Assess technology needs early, adapt guidelines, and provide ongoing technology solutions to ensure equitable access to learning for all students. |

## Domain 1—Adults

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| Teachers have Montessori credentials, from a MACTE or AMI accredited training program, for the age group they teach, in addition to any required licenses or credentials. | • All teachers are fully trained at the appropriate level and hold required licenses or credentials.<br>• All auxiliary staff (special education, PE) are Montessori trained or oriented.<br>• Montessori principles are evident in the actions of all adults. Key actions include: speaking softly, clearly, and respectfully to children and adults, refraining from offering unnecessary help, inviting as opposed to commanding, and student engagement in meaningful work. | • 90% of teachers are fully trained at the appropriate level, with the remainder in the process of earning an appropriate Montessori credential.<br>• Auxiliary staff have been oriented in Montessori theory and practice.<br>• Montessori principles are evident in many, but not all adults' actions. | • 85% of all teachers are fully trained at the appropriate level, with the remainder in the process of earning an appropriate Montessori credential.<br>• Montessori principles are evident in some adults' actions. | • Less than 85% of all teachers are fully trained at the appropriate level.<br>• Absence of robust knowledge of Montessori theory and practice is evident in the actions of adults; key actions include: interrupting students who are concentrating, using a loud, intrusive voice, attempting to control rather than model respectful behavior. |
| | **Considerations:** Preparing and supporting adults, including leaders, teachers, specialists, support staff, and adult family members, will be critical to success.<br>• Teachers in both remote and regulated in-person classrooms should have Montessori credentials for the age group they are teaching.<br>• Teachers whose Montessori training was interrupted, who did not have the opportunity to complete their observations and student teaching, or have yet to begin their training, should be provided opportunities for peer learning, observation of other classrooms, and additional support including Montessori material deliver and classroom management. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| Each teacher is supported by a paraprofessional/ assistant given Montessori-specific orientation for that role. | • All classrooms are staffed with an assistant who has completed a Montessori Assistant's course.<br>• The school provides an orientation workshop for all assistants.<br>• All assistants play an integral role in the culture of the classroom, providing support in the care of the environment, modeling positive behavior, assisting the teacher when students need redirection, and other duties as assigned by the teacher. | • 90% of all classrooms are staffed with an assistant who has completed a Montessori Assistant's course.<br>• The school provides an orientation workshop for all assistants.<br>• Many assistants play an integral role in the culture of the classroom. | • 75% of all classrooms are staffed with an assistant who has completed a Montessori Assistant's course.<br>• Some assistants play an integral role in the culture of the classroom. | • Fewer than 75% of all classrooms are staffed with an assistant who has completed a Montessori Assistant's course<br>• Assistants, when they are present, are disengaged from the work of the room or function solely as disciplinarians. |
| | **Considerations:** The role of paraprofessionals/assistants may be impacted by both remote learning and the guidelines for regulated in-person learning.<br>• Have a paraprofessional/assistant present for each cohort, even if the cohorts are smaller, in order for the teacher to focus on lessons while the other adult maintains the environment and supports student needs<br>• Flexibly assign assistants based on varying needs of in-person and remote teaching<br>• Provide alternate assignments for staff, such as cleaning and family engagement, to ensure meaningful work and purposeful connection.<br>• Continue to involve assistants in planning, staff meetings, and so on, to maintain connections and incorporate their perspectives and knowledge.<br>• Have residents in training serving as assistants work with training centers to ensure that these adult learners have opportunity for the experiences required by their training programs. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| All adults, Montessori trained or not, embrace core Montessori principles, respecting the process of human development and supporting children's independence, freedom, responsibility, and growth. | • All adults interact with children in ways that are deeply respectful and support their development as appropriate to the children's age and level of independence. | • Adults sometimes set developmentally inappropriate expectations for children, expecting too little or too much independence and responsibility.<br>• Adults sometimes interact disrespectfully with children (e.g., interrupting, ordering, teasing, contradicting, controlling…)<br>• Montessori trained staff interact appropriately, but untrained staff are poorly supported in appropriate interactions. | • Adults often set developmentally inappropriate expectations for children, expecting too little or too much independence and responsibility.<br>• Adults often interact disrespectfully with children (e.g., interrupting, ordering, teasing, contradicting…).<br>• Untrained staff show no awareness of appropriate interactions. | • Adult interactions with children are not guided by Montessori principles, and are developmentally inappropriate and disrespectful (controlling, interrupting, shouting, shaming, blaming, and so on). |
| | **Considerations:** Teachers in both remote learning and regulated in-person classrooms are experiencing the stresses of working within a new framework with new expectations and new requirements. Support all adults through this stressful time by:<br>• Offering social emotional and trauma support and counseling to staff.<br>• Working with flexibility and compassion.<br>• Offering training, tools, and strategies they can implement during online sessions and share with families.<br>• Working with staff on developing plans that support independence and responsibility in both a remote setting and an in-person setting | | | |

## Domain 2—Montessori Learning Environment

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| Children are grouped according to Montessori age groupings:<br>• 2.5–6<br>• 6–9<br>• 9–12<br>• 12–15<br>• 15–18 | • All learning environments reflect Montessori age groupings.<br>• Classroom communities serve at least 24 students supervised by no more than two adults.<br>• The primary point of entry to the program is age 3.<br>• For students who enter after age 4, the school has a well–elaborated orientation and induction program. | • All learning environments reflect Montessori age groupings.<br>• Classroom communities feature at least 24 students supervised by no more than two adults.<br>• Significant numbers of 5–year-olds may enter without prior Montessori experience, but these new students are carefully oriented. | • Mixed-age environments exist, but children are segregated by age, gender or ability.<br>• There is a stand-alone "kindergarten" program for 5 year-olds, but is working toward a full 3-6 program, and has a reliable method for orienting these children.<br>• Students age out of the school before the end of a 3-year cycle (e.g., after 1$^{st}$, 2$^{nd}$, 4$^{th}$, or 5$^{th}$ grades, for example). | • Children are grouped in single-grade or two-year classrooms.<br>• There is a stand-alone "kindergarten" program for 5 year-olds with no reliable method for orienting these children.<br>• Children are segregated by age, gender or ability. |
| | **Considerations:** Appropriate Montessori groupings may be harder to maintain, but are still important.<br>• Resist the temptation to fall back on grade level groups (e.g., grade-specific reading groups, on-line instruction of only one grade, or grouping smaller cohorts based on age).<br>• Continue multi-age student grouping to maintain collective, multi-ability learning and mentoring even if your cohort size must be smaller to allow physical distancing in school or more manageable interactions online. | | | |
| Learning environments provide uninterrupted 3-hour work periods | • All classrooms provide 3-hour morning work periods.<br>• Classrooms for older children provide 2-hour work periods, with limited interruption for specials and other programmed activity. | • All classrooms provide 2.5-hour morning work periods.<br>• Classrooms for older children provide 2-hour work periods, with limited interruption for specials and other programmed activity | • All classrooms provide 2.5-hour morning work periods.<br>• Classrooms for older children provide 2-hour work periods, but 2-3 times a week, those periods are taken up with specials and other programmed activity. | • Work periods are divided into small portions (e.g.: Readers or Writers Workshop, Literacy Block) with limited opportunity for children to concentrate on self-chosen work. |
| | **Considerations:** Even during remote learning, the bulk of students' time should be spent learning independently or with classmates, rather than in direct interaction with teachers.<br>may have recommendations or requirements for screen time and independent work time.<br>• Be mindful of the time students spend on a digital platform and offer independent work projects that can be done away from the screen.<br>• Provide families with ideas on how to support their children's work and incorporate movement breaks into a daily schedule. Your state, district or school | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| Specialty programs such as music, art, and second languages are integrated into the three-hour work cycle. | • The Montessori teachers confidently deliver Montessori music, using bells, tone bars and other materials integral to this part of the program.<br>• Materials for making and viewing art are visible on shelves, and students have access to them at all times.<br>• Bilingual staff support an immersion approach to second-language instruction. | • Specialty programs (music, art, second language) are offered as separate classes, but do not interrupt extended work periods.<br>• Students have free access to Montessori music materials— bells, tone bars, and so on. | • Specialty programs (music art, second language) are offered as separate classes, usually during afternoon work periods.<br>• Students have limited access to Montessori music materials. | • Specialty programs such as music, art, and second languages are delivered by non-Montessori specialists during work periods.<br>• There are separate morning and afternoon classes.<br>• Students have no access to Montessori music materials. |
| | **Considerations:**<br>• Under distance learning, specials teachers should offer adapted work that can be done from home and which includes resources children have access to (e.g., structured movement breaks, art and music projects, and so on).<br>• With in-person learning, either adjust time between classes to allow for cleaning or modify lessons to allow students to stay in their own classrooms. | | | |
| The environment supports a high degree of student choice in what to work on, where to work, and how long to work. | • Students can choose to work at tables, on rugs on the floor, or outside.<br>• Students have ongoing access to all materials, and are allowed to choose their work freely during extended work periods.<br>• Almost all instruction takes place in small groups (Elementary & Secondary) or one-on-one (Early Childhood). | • Students can choose to work at tables, on rugs on the floor, or outside.<br>• Students have ongoing access to all materials, and are allowed to choose their work for the majority of work periods.<br>• 80% of instruction takes place in small groups (Elementary & Secondary) or one-on-one (Early Childhood). | • Students have choice regarding where and what to work on for part of the day.<br>• Students may be assigned work but may choose where and in what order they will do their work.<br>• Whole or large-group instruction is used almost as much as individual and small group instruction. | • Student movement is restricted.<br>• Most students work at tables.<br>• Most learning is directed by adults.<br>• Most instruction takes place in whole-group formats.<br>• Teaching and learning are expected to follow a pacing set by the teacher. |
| | **Considerations:** It will be important to clearly communicate expectations about independence and exploration to students and families as well as provide opportunities for big work that can be done at home (e.g., elementary student research work).<br>• Offer simple, straightforward guidance to families regarding a balance of support and independence, being mindful of different cultural characteristics, English literacy levels, and ability to engage.<br>• Give families guidelines including use of video conferencing, appropriate preparation, and behavior on video calls.<br>• Help families understand the characteristics of a prepared environment at home through virtual adult caregiver education events, video tours of classroom spaces, and reading material.<br>• Share information with families about the use of outdoor environments and public spaces as opportunities for learning and independence.<br>• Provide school supplies such as paper, tape, colored pencils, to be taken home. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| The full complement of Montessori materials is available in every area, representing the majority of materials on all shelves. Additional materials conform to Montessori standards of order, beauty, and simplicity. | • The full complement of Montessori materials is available in every area.<br>• Montessori materials are meticulously cared for and displayed in an orderly and inviting manner, representing the majority of work available to students.<br>• Materials are in constant use. | • The full complement of Montessori materials is available in every area.<br>• Montessori materials are displayed in an orderly and inviting manner, representing the majority of work available to students.<br>• Materials are in good repair and ready for use.<br>• Materials are in regular use. | • There is less than a full complement of Montessori materials.<br>• Montessori materials are visible, but not organized in a way that invites robust engagement and concentration.<br>• Montessori materials are liberally supplemented with other curricular approaches. | • Montessori materials may be visible, but the majority of work involves other materials and resources, such as worksheets, text books, or computers.<br>• The environment is cluttered, with little attention to order, beauty and simplicity. |

**Considerations:** In all learning models, it is important to keep an adherence to past Montessori practices from becoming an obstacle to remote learning or the new requirements that may present challenges to in-person classrooms.
- Focus on equity-centered principles of universal design, providing multiple modes of content delivery, varied options for demonstrating learning, and multiple means of engagement so that students are exposed to developmentally appropriate concepts with "low-floor/high ceiling" activities.
- For remote learning, provide additional sets of materials, handmade materials, and packets to send home to increase access to interactive experiences. Platforms such as Google Classroom, SeeSaw, Clever, and Zoom will allow staff to deliver synchronous lessons and to facilitate follow-up work.
- In designing lessons, include follow-up opportunities that support independent work at home.
- In a hybrid model, strategically plan the use of in-person and remote learning periods for lessons and follow-up. Consider the possibilities of a "flipped classroom" where remote work serves as pre-learning and reflection, and in-person time privileges hands-on work.

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| The learning environment offers ongoing access to real-world materials and activities. | • Children have ample opportunities to engage in care of the classroom, food preparation, dining and meal cleanup, and plant and animal care, and these activities are a regular part of children's activity.<br>• Tools and materials for practical activities are functional and child-sized.<br>• Appropriate cutlery, glassware and dishes are used daily. | • Children have some opportunities to engage in care of the classroom, food preparation, dining and meal cleanup, and plant and animal care, and are at times engaged with them.<br>• Functional child-sized tools and materials are available, but the supply is limited or some are not appropriate for children's use.<br>• Appropriate cutlery, glassware and dishes are used daily. | • Some real world activities are available, but children do not spontaneously engage in them.<br>• Tools and materials are very limited, or mostly inappropriate for children's use.<br>• Care of the classroom, food preparation, dining and cleanup, and plant and animal care are handled mostly by adults.<br>• Children eat with disposable cutlery, plates, and cups. | • No real world activities are available.<br>• Care of the classroom, food preparation, dining and cleanup, and plant and animal care are handled by adults.<br>• Children eat with disposable cutlery, plates, and cups. |
| | **Considerations:**<br>• Within in-person models, give as much opportunity as is allowed by local guidelines to care for the classroom environment.<br>• In remote learning, help families to understand the characteristics of a prepared environment at home through virtual adult caregiver education events, video tours of classroom spaces, and reading material.<br>• Provide adult caregivers a wide array of ideas for using real-world materials in the home as well as helping adult caregivers understand that these real-world activities are valuable to the child's development.<br>• Emphasize the continued importance of real-world work within the remote education assignments.<br>• Offer specific "assignments" to families for at-home or neighborhood activities, including household tasks, "nature walks", botany work, and neighborhood explorations.<br>• In person, engage students in practical life and building prosocial classroom norms related to sanitization, grace and courtesy lessons, and cleaning procedures as local guidelines permit.<br>• In both in-person and remote learning, use students' natural interests to ask new questions and develop new learning opportunities. Instead of canceling "going out" opportunities, consider new protocols such as virtual field trips, neighborhood explorations, expert virtual visitors. | | | |
| The learning environment offers appropriate access to a prepared outdoor environment. | • Children have free access, within appropriate limits, to a well-prepared outdoor learning environment.<br>• The outdoor environment is in regular use. | • Children have some access to a well-prepared outdoor learning environment.<br>• The outdoor environment is in occasional use. | • Access to the outdoor environment is tightly restricted by adults.<br>• The outdoor environment is not well prepared or appropriate for children's use.<br>• The outdoor environment is infrequently in use. | • Access to the outdoors is only available during "recess", as a free play activity.<br>• The outdoor environment is not well prepared or appropriate for children's use. |
| | **Considerations:**<br>• For remote learning, emphasize the importance of outdoor activities and offer specific "assignments" for outdoor exploration such as nature walks, botany work, or neighborhood exploration.<br>• During in-person learning, take advantage of the outdoor environments for physical distancing and for learning opportunities. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| SPED students are fully included and supported within the classroom. | • Montessori teachers are dual certified as SPED teachers and able address all but most significant learning issues through the Montessori program.<br>• SPED and Resource Teachers are Montessori trained or oriented and work in collaboration with Montessori teachers to provide special services within the prepared environment. | • SPED students are pulled out for small portions of the day, or specialists come in the classroom but work with the SPED students apart from the rest of the group and primarily through non-Montessori materials. | • SPED students are pulled out of the Montessori classroom for large portions of the day. | • SPED students have a separate program for most or all of the day. |
| | **Considerations:** Providing for the needs of diverse learners can be challenging during remote learning. It is essential that staff center equity in all planning and seek guidance from school and district experts for meeting the needs of all students.<br>• Ensure that scheduling with SPED staff does not conflict with students' online meetings with their class.<br>• Make changes to IEPs to support the needs of students with specific accommodations in the virtual classroom. | | | |
| ELL students are fully included and supported within the classroom | • Montessori teachers are dual certified as ELL teachers.<br>• ELL Resource Teachers are Montessori trained or oriented and work in collaboration with Montessori teachers to provide special services within the prepared environment. | • ELL students are pulled out for small portions of the day, or specialists come in the classroom but work with the ELL students apart from the rest of the group and primarily through non-Montessori materials. | • ELL students are pulled out of the Montessori classroom for large portions of the day. | • ELL students have a separate program for most or all of the day. |
| | **Considerations:** English Language Learners may struggle in the virtual classroom because they are not able to use non-auditory cues to support understanding as readily as when face-to-face. It is essential that staff center equity in all planning and seek guidance from school and district experts for meeting the needs of ELL students.<br>• Provide translation services and additional support to students and families, including technical support, internet and device accessibility, and help navigating the platform being used. | | | |

## Domain 3—Family Engagement

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| A strong partnership between home and school is evident in all formal and informal communications. | • A well-developed *Family Handbook* elaborates mutual expectations in clear, accessible language.<br>• Robust, two-way communication begins prior to enrollment and is visible in a website, newsletters, letters home, and processes for parent-teacher conferences.<br>• All relevant documents are translated into languages reflecting the school's population.<br>• The school's Parent Engagement plan may include home visits.<br>• Faculty and staff reflect the ethnic, linguistic and racial makeup of the student body. | • A well-developed *Family Handbook* elaborates mutual expectations in clear, accessible language.<br>• The school maintains an active website.<br>• Most classrooms distribute newsletters and other regular communications such as websites, blogs, or Google groups.<br>• Highest priority documents are translated into the languages reflecting the school's population.<br>• Efforts are made to hire faculty and staff that reflect the ethnic, linguistic and racial makeup of the student body. | • A *Family Handbook* exists, but is out-of-date and not widely distributed.<br>• Communication between home and school is limited to informing families of events, deadlines, and other administrative matters.<br>• Some classrooms distribute newsletters and other regular communications, but there is no coordinated system for ensuring that all members of the community are informed.<br>• Translation services are limited. | • A *Family Handbook* may exist, but is out-of-date and not widely distributed.<br>• Communication between home and school is sporadic, and usually in the form of announcements from the administration.<br>• Translations are sporadic or non-existent. |

**Considerations:** Under remote education conditions, families are schools' most important resource, and they need reassurance, support, education, collaboration, and patience. Communication is key in remote, hybrid, and in-person learning during COVID-19.

- Communicate with caregivers early and often and share consistent messaging around the school's values and approach to academic and social-emotional growth and development.
- Provide clear, direct written and oral communication regarding schedules, expectations, and available school supports being offered to families.
- Make communication accessible to all families (delivered via multiple media and translated into the languages spoken by caregivers).
- Offer virtual and/or in-person meetings, allowing plenty of space for questions & answers.
- Give adult caregivers the opportunity to communicate with the school both on an as-needed basis by scheduling family conferences more frequently using virtual platforms and using surveys to check in throughout the school year.
- Create a protocol for teachers to notify administration of families they cannot reach, and then make every possible effort to reach them.

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| The school provides ongoing opportunities for family education, including information sessions, discussion groups, observation of classrooms, and parent-teacher-student conferences | • The enrollment process features multiple opportunities for parents to learn about Montessori and the family commitment expected by the school. These events are well planned and executed, and attended by large numbers of prospective families.<br>• A robust family induction process includes open houses, orientation evenings, and networking with experienced families.<br>• Family education opportunities are offered monthly. | • The enrollment process features some opportunities for parents to learn about Montessori and the family commitment expected by the school.<br>• The school offers an orientation evening for new families.<br>• Family education opportunities are offered quarterly. | • The enrollment process may feature events such as open houses, but they are poorly advertised and sparsely attended.<br>• The school offers an annual Open House.<br>• Family education opportunities are offered sporadically. | • The enrollment process includes no opportunities for families to learn about the school, and any families enroll without any knowledge of Montessori education.<br>• No family education opportunities are offered. |

**Considerations:** Adult caregivers are in many ways "co-teachers" during remote learning.
- Orient caregivers to the idea of independent follow-up work that can be done at home and share ideas about how to support children's independence by assisting and observing, but not interfering.
- Use surveys or written feedback documents to engage adult caregivers in observing and assessing their children's activities at home.
- Continue offering virtual (or in-person, if possible) caregiver education.
- Celebrate images and narrative from teachers and families in school newsletters of your Montessori successes.

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| The school cultivates a strong school-home association, in which parents have authentic opportunities to contribute meaningfully to the school's mission and communicate with school leadership. | • The school maintains a designated space for adults to gather, which includes a resource library filled with material related to Montessori, child development, parenting, and other topics of interest.<br>• The school employs a Community Engagement specialist, who supports the family community by partnering with parent leaders, assisting in the coordination of volunteer opportunities.<br>• There is an active school board and/or governance council with significant family representation.<br>• Minutes of all meetings are shared with the entire community. | • The school's School-Home or Family Association is active, with parent/adult leaders visible in the school.<br>• Minutes of all meetings are shared with the entire community. | • The school has a School- Home Association, but it is not active.<br>• The school's Board or governance council may have family representation, but families do not regularly attend meetings.<br>• Minutes of meetings are not regularly shared with the community. | • There are no formal structures through which families can participate in the school. |
| | **Considerations:** Family engagement and parent support will be critical in this time.<br>• Provide the school's School-Home or Family Association a time to meet regularly via a virtual platform or in-person, if possible.<br>• Advertise these meeting so that all families have the opportunity to attend.<br>• Create a virtual family lounge with family resources such as information about community services, Montessori, child development, and socially distanced activities.<br>• Offer regular virtual "office hours" at a variety of times during which caregivers can ask questions of or offer feedback to instructional and/or staff administrative staff. | | | |

## Domain 4—Leadership and Organizational Development

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| An experienced Montessori educator guides the implementation of the Montessori program, as Principal, Program Director, Curriculum Coordinator or Instructional Coach. | • A Montessori trained school leader communicates and advocates effectively for full Montessori implementation.<br>• At least one instructional coach, with Montessori training for at least one program level, supports full Montessori implementation as a primary responsibility. | • The school leader is not Montessori trained, but is enthusiastically engaged in ongoing Montessori professional development.<br>• A trained Program Director or Montessori Coach supports the untrained school leader. | • The school leader is not Montessori trained, and has engaged in minimal Montessori professional development.<br>• The school does not employ a Montessori Program Director or Coach, but does rely on the expertise of experienced teachers or consultants in making program decisions. | • The school leader is unwilling to engage in Montessori professional development<br>• The school leader regards Montessori as an aspect of the school program rather than the essence of the school program.<br>• The school leader engages in teacher evaluation and program development systems that are in conflict with Montessori principles and practice. |
| | **Considerations:** Supportive coaching is more important than ever while teachers need extra support venturing into uncharted territory.<br>• Continue Montessori coaching during remote, hybrid, and in-person models, including classroom (virtual or in-person) observations and coaching conversations between the coach and teacher.<br>• Consider increasing the frequency of these sessions and adding weekly grade-level team coaching that focuses on student engagement and sharing successful online learning activities and skills. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
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| The school has a clear vision for how it delivers Montessori education, and has an active cycle of reflection and self-review. | • The school has a current and active strategic/school improvement plan, which is grounded in Montessori principles, informed by multiple constituents, and widely understood and embraced by the school community.<br>• The school regularly employs Montessori consultants to provide internal and external audits of program quality, and incorporates consultant feedback into an ongoing strategic planning process.<br>• The school has a well-articulated and transparent process for inducting, mentoring and evaluating teachers.<br>• Teachers are evaluated based on a protocol designed to support fully implemented Montessori practice. | • The school has a living strategic/school improvement plan, which is grounded in Montessori principles, informed by multiple constituents, and made available to the school community.<br>• The school has employed a Montessori consultant within the past three years to provide internal support for strategic planning and instructional improvement.<br>• Teachers are evaluated based on a protocol that is friendly to Montessori pedagogical principles. | • The school is in the process of developing a strategic/ school improvement plan, which includes goals for improving Montessori practice.<br>• The school does not look to outside resources for Montessori support.<br>• Teachers are evaluated in part or whole based on a protocol that does not reflect Montessori practice. | • The school's strategic/school improvement plan includes no goals for improving Montessori practice.<br>• Teachers are evaluated based on a protocol that has no relationship to Montessori pedagogical practice. |
| | **Considerations:** Health, safety and child development should be at the center of all planning. <br>• Prioritize social-emotional supports.<br>• Make clear, realistic plans with the Montessori mission as a base, and communicate clearly and frequently with families and staff.<br>• Reinforce the vision that Montessori materials are a means to developmental learning, but not an end in themselves.<br>• Share and promote novel Montessori adaptations to help the school community see that Montessori doesn't have to look one single way for it to be successful.<br>• Support teachers in implementing new teaching platforms in ways that support the school's vision. | | | |
| The school maintains membership in one or more Montessori professional organizations, and seeks accreditation to ensure consistent quality. | • The school is accredited or recognized by at least one major Montessori professional organization. | • The school maintains membership in at least one major Montessori professional organization.<br>• | • The school is not a full member (due to costs or other constraints), but leaders and staff attend at least one major Montessori professional organization's conference. | • The school has no connections with any Montessori professional organization. |
| | **Considerations:**<br>• Maintain membership in Montessori professional organizations and seek resources that they may be offering during this time. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
|---|---|---|---|---|
| The school has a pipeline for recruiting, training, hiring, and retaining high quality Montessori teachers. | • The school sponsors two or more teachers for Montessori training annually.<br>• The school provides a robust annual Assistant's/Fundamentals Course.<br>• The school has a strong relationship with a MACTE accredited or AMI Montessori training center.<br>• The school recruits broadly and provides a substantive interview and induction process for all prospective and new hires. | • The school's budget supports sponsorship for Montessori training for at least one new teacher a year.<br>• The school offers orientation and professional development designed to support classroom assistants. | • The school's operating budget does not support annual sponsorships, but efforts are made to raise funds for the specific purpose of supporting the talent pipeline. | • The school has no systems in place to ensure a reliable pipeline of high quality Montessori teachers. |
| | **Considerations:** Teachers are leaving jobs and training programs have been interrupted, disrupting the teacher pipeline.<br>• Provide teachers whose Montessori training was interrupted or who did not have the opportunity to complete their observations and student teaching, opportunities such as peer learning, observation of other classrooms, and additional support in Montessori material delivery, classroom management.<br>• Plan for next years' staffing earlier than usual in case there are teacher shortages and/or training centers are operating on a reduced schedule. | | | |
| All adults engage in ongoing Montessori professional development. | • All adults engage in ongoing Montessori professional development.<br>• | • 50–90% of adults engage in ongoing Montessori professional development. | • Some, but fewer than half, of adults engage in ongoing Montessori professional development. | • Adults do not engage in ongoing Montessori professional development. |
| | **Considerations:** Professional development schedules and opportunities have been disrupted.<br>• Maintain the existing meeting patterns (such as level, classroom teams, and cross-building/campus) and give attention to the increased need to support remote, in-person and hybrid models.<br>• Adapt but maintain classroom observations, feedback, and other routines and practices.<br>• Include on-going trauma-informed, social justice, and equity-oriented professional development and support.<br>• Train staff on new platforms and modalities (such as Zoom or Google Meet). | | | |

**NATIONAL CENTER** for
**MONTESSORI** in the **PUBLIC SECTOR**

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
|---|---|---|---|---|
| Adults treat one another with respect, and model respect in their interactions. | • All adult interactions are respectful.<br>• Respect characterizes formal and informal school activities.<br>• Respect characterizes interactions with families | • Most adult interactions are respectful.<br>• Respect characterizes most formal and informal school activities.<br>• Respect characterizes most interactions with families. | • Adults are sometimes disrespectful, peremptory or dismissive with one another.<br>• There are notable status divisions among trained teachers, support staff, and administrative staff. | • Adults are generally disrespectful, peremptory or dismissive with one another.<br>• Non-teaching staff are blatantly disrespected or delegitimized. |
| | **Considerations**: Respectful social interactions are harder to maintain and more important than ever in stressful times.<br>    • Encourage and model leading with understanding, listening with an open heart, and second chances.<br>    • Celebrate successes.<br>    • Protect the tender first year of new teachers and the morale of all teachers by making explicit the connections between Montessori training and current practice. | | | |
| Montessori practice is supported by a clearly defined Montessori scope and sequence, integrated with (but not driven by) state standards. | • Faculty and staff understand and can explain the Montessori approach and how it meets state standards.<br>• A Montessori scope and sequence aligned with state standards is shared widely in the school and available to families, district staff, and other stakeholders.<br>• Teachers lead with their Montessori training and refer back to state standards as necessary. | • Most faculty and staff understand and can explain the Montessori approach and how it meets state standards.<br>• An alignment of the Montessori scope and sequence with state standards is in process.<br>• The Montessori scope and sequence is part of internal and external communications.<br>• Teachers mostly lead with their Montessori training and refer back to state standards as necessary. | • Many faculty and staff members are unclear on the Montessori approach and how it meets state standards.<br>• No alignment of the Montessori scope and sequence with state standards is in use.<br>• The Montessori scope and sequence is available but not part of community understanding or regular practice.<br>• Teachers mostly lead with state standards and use some Montessori materials and lessons to teach them. | • Faculty and staff are following a scope and sequence that conflicts with Montessori pedagogy.<br>• Teaching is entirely driven by state standards. |
| | **Considerations:** The temptation to shift from Montessori practice and curriculum to more conventional content is heightened when Montessori is harder to deliver and stakes are high.<br>    • Utilize skills inventories, exit outcomes, and Montessori lessons to guide remote, hybrid and in-person instruction.<br>    • "Big work" (such as writing, research, outdoor botany projects, and nature walks) can be done with limited access to materials and aligned to standards. | | | |

## Domain 5—Assessment

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
|---|---|---|---|---|
| Assessment protocols integrate measures of academic achievement with measures of executive functions such as self-regulation, initiation, and cognitive flexibility. | • The school tracks multiple indicators of success through means such as alumni, parents, and receiving teacher surveys.<br>• The school uses cognitive measures such as the Flanker Inhibitory Control Task, or the Minnesota Executive Function Scale (MEFS), to document wide-scope developmental outcomes.<br>• The school maintains profiles of all students based on narrative appraisal and work sampling, as well as performance on standardized academic measures. | • The school is in the process of developing a protocol that allows the documentation of social and emotional and executive function outcomes.<br>• The school maintains profiles of all students based on narrative appraisal and work sampling, as well as performance on standardized academic measures. | • The school includes narrative appraisals of social and emotional development as part of its assessment and reporting protocols, but has no larger system for tracking wide-scope student outcomes. | • The only form of assessment is state-mandated tests.<br>• Results are reported without context.<br>• Minimal standards of proficiency drive instruction. |

**Considerations:** Continuous observation and formative assessment, engaging children and families in the process, are essential.
- Integrate portfolio or competency-based frameworks for assessment.
- Enlist caregivers as observers and support them in knowing what to notice in their children's academic and executive function development
- Collect work samples in online platforms (Google Classroom, Seesaw, and so on).

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| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
|---|---|---|---|---|
| Ongoing, personalized qualitative assessment, in the form of observation and documentation, drives all instructional decisions. | • Regular, recorded observation is the basis of planning and assessment.<br>• The school uses an online record-keeping system to ensure that data are collected and managed effectively.<br>• Teachers make time daily to record observed activity within the environment.<br>• An observer's chair is visible in the environment.<br>• Teachers meet weekly as teams to discuss student progress, reflect collectively on challenges, and share potential solutions. | • Regular, recorded observation is the basis of planning and assessment.<br>• Some teachers use an on-line record-keeping system to ensure that data are collected and managed effectively.<br>• Teachers make time daily to record observed activity within the environment.<br>• An observer's chair is visible in the environment.<br>• Teachers meet occasionally as teams to discuss student progress, reflect collectively on challenges, and share potential solutions. | • Some teachers make time daily to record observed activity with the environment, but there is no link to a larger system of data management.<br>• Some classrooms have an observer's chair. | • There is no evidence of ongoing, recorded observation.<br>• Teachers do not meet to reflect on student progress. |
| | **Considerations:** Observation must continue to drive instructional decisions.<br>    • An online record keeping system, such as Transparent Classroom, Montessori Compass, or Montessori Records Express, can help organize observational data as well as lessons given and follow-up work completed.<br>    • During grade level meetings, prioritize time to talk about student progress and challenges. | | | |
| Assessments are delivered in the least obtrusive manner possible. | • Formative and summative assessments are delivered to individual students during work periods.<br>• Tests are treated as Practical Life activities, with minimal emphasis or work disruption.<br>• Test preparation is limited to practice experiences designed to familiarize students with format and language. | • Summative assessments are delivered during testing windows.<br>• Total test preparation constitutes no more than one week of student work time. | • Formative and summative assessments are delivered to the whole school/whole class during prescribed testing windows.<br>• Test preparation constitutes more than two weeks of student work time. | • Testing windows take over the entire school day, with work periods suspended, students grouped in grade-level cohorts, and assessments proctored by unfamiliar teachers.<br>• Preparing for tests drives the school's program. |
| | **Considerations:** Montessori-based observational assessment may be harder to implement.<br>    • Advocate with state and district decision-makers for modification or suspension of standardized testing.<br>    • Deliver assessments individually to students as needed during remote learning. Treat this as you would any other one-on-one lesson with a student. | | | |

| STANDARD | EXEMPLARY | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY |
|---|---|---|---|---|
| As students mature, they are increasingly involved in monitoring their own progress. | • Beginning in the elementary level, students keep daily journals of their work.<br>• Teachers regularly confer with students to assist in the development of personal learning goals and to reflect on progress.<br>• Beginning in the elementary, students regularly participate in parent-teacher discussions of student progress. | • Students keep work journals, but they are not regularly employed in the self-assessment process.<br>• Teachers sometimes confer with students to assist in the development of personal learning goals and to reflect on progress. | • Students are given assigned "work plans" which they have little input in developing or reflecting on.<br>• Work plans require the teacher to "check-off" completed work rather than allowing students to manage their time and productivity. | • Students are disconnected from the assessment process, except to receive grades. |
| | **Considerations:**<br>• Continue involving students in monitoring their own progress through individual conferences.<br>• Expand assessment to include social-emotional check-ins and measures. | | | |