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Abstract

The sustainable development of the Montessori Method of education throughout times of change demands strong and transparent leadership. This research examined the historical perspectives and the context of the American Montessori Society Living Legacy leadership paths as well as interviews with living legacy recipients. Analysis of narratives of experience revealed how the collective visions of Montessori leaders thematically intersect with the sustainability and growth of Montessori education and future Montessori leaders.

Keywords: Montessori, Living Legacy, Leadership, American Montessori Society, Narrative
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Introduction

Dr. Montessori the Leader

The Montessori Method of education was developed by Dr. Maria Montessori. The Montessori Method is based on her scientific observations of children from birth to adulthood focusing on the development of a person. Dr. Maria Montessori was a physician, scientist, professor, anthropologist, intellectual, peacekeeper, educator, advocate, activist and a true leader.

Dr. Montessori designed the prepared educational model and environment to assist the child in self-construction. “Three factors determine the course of this inner construction” (Montessori, 1976, p.25). One is the child’s psyche and their needs. The second is the cultural community and how to maneuver inside this. Third is the material world and how to work with what is given. “The child’s development follows a path of successive stages of independence, and our knowledge of this must guide us in our behavior towards him. We have to help the child to act, will and think for himself: This is the art of serving the spirit, an art which can be practiced to perfection only when working among children” (Montessori, 1995, p. 257). Dr. Montessori created a learning method and philosophy that embraces all through peace, honor, purpose, and respect.

USA Montessori Movement

The first Montessori school opened in Europe in 1907 was named Casa dei Bambini. In this first experimental school, Montessori developed some of the foundations of her method. Modeled on this first school. Montessori schools provide students with a prepared educational
environment that follows the child’s natural abilities to learn and grow while promoting independence, respect, and self-regulation. The Montessori movement began in the United States in 1911. By 1920 the Montessori movement weakened significantly in the USA for reasons of language barriers, travel hindrances due to World War 1 and the impact of a few negative educational critics. Yet in other parts of the world the Montessori educational method thrived. Then in the USA, in 1958 the Montessori movement reemerged through the dedication of a woman named Dr. Nancy McCormick Rambusch. She was well versed in educational philosophies and an increasingly curious advocate for education. Similar to Maria Montessori, Rambusch researched and made connections with educators abroad. In her quest to learn more on educational systems, Rambusch attended the Tenth International Montessori Congress in Europe. There she met Mario Montessori (Maria’s son) and formed a professional connection that led her to take her Montessori primary and elementary training.

Rambusch went on to have a small Montessori play group in her New York City apartment. In the meantime, a woman named Georgeann Skakel Terrien with a few other parents was looking at starting a Montessori school in Greenwich Connecticut. They began to recruit Rambusch as the Head of school. Rambusch contacted Mario Montessori and “discussed the possibility of accepting Georgeann’s invitation to start a Montessori school in Greenwich. Mr. Montessori was intrigued by the notion of a new Montessori presence in America. He agreed to help Rambusch in any way that he could to ensure a successful foundation of Montessori in the United States” (Gravel, 2010, p. 25). With this collaboration and support the first Montessori school named Whitby School was formed in United States of America. This created media frenzy and brought the Montessori Education model to the public forefront.
In 1959, as the school was flourishing Rambusch began the first teacher training program in the United States within Whitby school with the help of Mario Montessori. In 1960, Dr. Nancy McCormick Rambusch founded the American Montessori Society (AMS) in order to promote and sustain the Montessori philosophy in the United States.

**Research Purpose**

Montessori education in the United States is experiencing significant growth in early childhood, elementary, middle and secondary public and private schools.

As the figure above illustrates, during the same period, 153 public Montessori programs were moved to other school sites or were closed entirely. Our data shows that 42% were programs consolidated to other schools in the same city, 35% were district schools, 16% were charter schools and 6% were federally and state funded early childhood centers” (National Center for Montessori in the Public Sector, 2014, para. 3). As Montessori schools increase in numbers, so does the need for Montessori leaders. In order to cultivate sustainable and effective
Montessori leadership, we need to listen and learn from recognized Montessori leaders. The purpose of this research is to gain knowledge and perspectives from a group of uniquely qualified leaders in Montessori education in the United States in order to continue to develop a framework for preparing Montessori leaders of the future and to continue the growth of the Montessori Education system.

The “American Montessori Society” has established a tribute that honors individuals whose leadership has made a lasting impact on the USA Montessori community. These esteemed individuals are named Living Legacy leaders and will be the participants interviewed. Their individual and collaborative actions are in alignment with the American Montessori Society’s values: respect, integrity, diversity, inclusiveness, responsible and enthusiasm. The primary research question is “Are we creating sustainability within leadership in our Montessori community?”

**Literature Review**

As the Montessori Method is continuing to grow within the public and private school systems in the United States and worldwide, it is important to know and acknowledge the history of the Montessori individual, collaborative and organizational leadership but also to examine how the past and present leaders have sustained the Montessori education model through their work. In order to identify the relationship between the Legacy Leaders’ roles and the growth of Montessori education, it is essential to understand the mission of the American Montessori Society and the origin of the AMS Living Legacy leaders.

**American Montessori Society**
The American Montessori Society (AMS) is a non-profit organization that is comprised of “a vibrant community of schools, teachers, teacher education programs, families, and friends determined to make Montessori a strong and positive force in education throughout the world” (AMS, 2017, para. 1). The mission of the American Montessori Society states, “We provide the leadership and resources to make Montessori a significant and enduring voice in education. We serve our members, advocate for quality Montessori education, and champion Montessori principles” (AMS Mission, 2017, para. 2). AMS has a strong and unified purpose to continue the educational pedagogy of Dr. Maria Montessori for all.

The American Montessori Society is currently led by the Executive Director Richard A. Ungerer and the Board of Directors. Richard Ungerer will be retiring this year (2017) and AMS is welcoming Dr. Tim Purnell as the incoming Executive Director. Ungerer is known as a strategic and visionary leader, which is reflected within this statement he wrote in 2005, twelve years ago, “I close with my vision for the future, a future that includes communities where exponentially greater numbers of children and their families are part of the Montessori experience, together creating a more just and caring society of lifelong learners, problem solvers, and stewards of the planet” (Ungerer, 2005, p.6).

In the present time, AMS is the largest Montessori organization in the world (AMS, 2017) with 1,300 member schools, 13,000 individual members and with approximately 100 AMS-affiliated teacher education programs. While this is encouraging, it is also sensible to be prudent and examine what people and factors have resulted in sustainability thus far within the Montessori Method of education.

Living Legacy Origin
Susan Bosack is a social researcher from the Legacy Project. She states a “legacy is about life and living. It is about learning from the past, living in the present, and building for the future. The concept of legacy is a powerful life tool for all ages and a catalyst for social change” (Bosack 2017, para.1). This describes all of the AMS Living Legacy recipients and their past and current journeys. Living Legacy leaders are honored each year at the annual AMS National Conference for their deep commitment to the Montessori pedagogy.

Mindful leaders create meaningful opportunities for others to grow.

“In a casual, brainstorming conversation in the late 1980s, Susie Shelton Dodge, past president of AMS, suggested that the teacher education scholarship committee, with the approval of the Board of Directors, create an American Montessori Society Living Legacy ‘to recognize individuals whose exemplary achievements have had significant impact . . .’ on children and families in American Montessori Society schools. The AMS Board, in conjunction with Shelton Dodge, felt the Living Legacy would serve two noteworthy goals: to honor and thank in a very public way Montessorians who have made outstanding contributions to the education of children and to the Society and to provide a focus for raising sufficient funds to support teacher education scholarships” (A History of the Living Legacy, 2007, p.52).

The American Montessori Society recognizes AMS members who continue to carry on Maria Montessori’s legacy through the dedication of their leadership and their valuable work in the Montessori field.

*American Montessori Living Legacy Honorees:*

2017 Alice Renton

2016 Carolyn Kambich
2015 Maria Gravel
2014 John Chattin-McNichols
2013 Joyce Pickering
2012 Chandra Fernando
2011 Sonnie McFarland
2010 Judi Bauerlein & All Montessori Teacher Educators
2009 Marie M. Dugan
2008 Dr. Betsy Coe
2007 Dottie Sweet Feldman &
All Montessori Teachers
2006 Aline D. Wolf
2005 Celma Pinho Perry
2004 Bretta Weiss Wolff
2003 Sr. Anne McCarrick
2002 Sr. Anthonita Porta
2001 Dr. Ruth Corey Selman
2000 Carole Wolfe Korngold
1999 Beverley McGhee
1998 Marjorie Farmer
1997 Joy Starry Turner
1996 Dr. Margaret (Peggy) Loeffler
1995 Effie Weinberg
1994 Dr. Virginia Varga
Leadership Development in Montessori

Within the Montessori education realm there are many adult leader roles: an administrator, a board member, a committee chair: a directress or guide, a teacher educator and overarching organizational leaders on a local, state and level. Leadership models and paths impact the systems in place to create a successful prepared environment of sustainability within the Montessori education communities. Servant, collaborative and transformational leadership models emulate many of the same desirable qualities of a Montessori leader. Further thought and research has opened my awareness to think about how each school and organization is unique and the possibility that each entity may need a specific leadership model to align with their needs as well as lead them in a progressive and sustainable way.

Leadership Models

It is vital to understand the role leadership plays in an organization. Emphasis is placed on internal and external implications when servant leadership, transformational leadership and collaborative school leadership are utilized in designated schools and organizations. One could debate which elements of each of these models are utilized in Montessori school or organizations. We will examine each of the three models. Leadership affects and creates the climate of the schools and Montessori organizations.

Servant Leadership

Servant leaders desire to serve in areas they believe in and are dedicated too. “The servant leader is servant first. It begins with the natural desire to serve. The conscious brings ones desire to lead. The best test: is do those served grow as persons: do they while being served become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society; will they benefit, or, at least, not be
That concept is how Dr. Montessori began serving the underprivileged children in asylums and slums through her educational method. The following values displayed below are characteristics of a servant leader.

Transformational Leadership

Leadership theorist James McGregor Burns identifies that transformational leadership "looks for potential motives in followers, seeks to satisfy higher needs and engages the full person of the follower" (Burns, 1978, p. 4). This idea relates to one’s belief in the Montessori educational method and the collective action of the Montessori organizations to grow.

The four dimensions of transformational leadership are charisma or idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration. Charisma, or idealized influence, is the degree to which the leader behaves in admirable ways that cause followers to identify with the leader. Charismatic leaders display conviction, take stands, and appeal to followers on an emotional level. Inspirational motivation is the degree to which the leader articulates a vision that is appealing and inspiring to followers. Leaders with inspirational
motivation challenge followers with high standards, communicate optimism about future goal attainment, and provide meaning for the task at hand. Intellectual stimulation is the degree to which the leader challenges assumptions, takes risks, and solicits followers’ ideas. Leaders with this trait stimulate and encourage creativity in their followers. Individualized consideration is the degree to which the leader attends to each follower’s needs, acts as a mentor or coach to the follower, and listens to the follower’s concerns and needs. (Judge, 2004, p.755)

Collaborative Leadership

Four components of collaborative leadership that can help school leaders accomplish what works best for their schools are:

1. Helping faculty members grow in their knowledge and experience through collaborative community meetings and team meetings;
2. Putting a system in place to support the professional growth of all teachers accordingly to their needs;

3. Having a strategic plan developed by the entire school community that declares the school’s mission and creates an action plan to achieve that mission:

4. Providing opportunities for teachers and administrators to collaborate to deal with classroom challenges.

McKenzie (2005) found these four opportunities support collaborative leadership where leaders and teachers are united in pursuit of higher-level goals. These strategies hold great promise for helping our schools improve professional practice and student achievement (p. 42).

**Conclusion**

Within the scope of Montessori there is a wide range of leaders and leadership models used. This research has opened my awareness to think about how each school and organization is unique. Each entity may need a specific leadership model to align with their needs. In each
leadership model listed above there are characteristics that the AMS Living Legacy leaders use and interchange depending on the experience and the situation.

Methodology

Narrative Inquiry

The methodology utilized in this study is that of qualitative research exploring narrative interviews through narrative inquiry and thematic analysis. As the researcher, I chose the narrative inquiry approach for this paper to honor and gain insight from the stories of leaders in Montessori. Each living legacy interview revealed another part of each participant’s historical context and actions which helped to identify individual and collective factors for sustaining leadership in the field. “Narrative as a discursive form, narratives as history, and narratives as life stories and societal stories have been approached by cultural and literary theorists, linguists, philosophers of history, psychologists and anthropologists” (Jovchelovitch, 2000, p.2). Narrative inquiry is a window to look and listen to others life perspectives from their experience.

Participant Selection and Data Collection

The participants were selected to be interviewed because of their role in the American Montessori Society and the title earned as a Living Legacy. There are five participants in this study. They selection process was done through contacts given to me from other Montessorians. Potential interviewees were contacted initially by email to request if they would be interested in participating in this research study. After each responded with a written agreement via email (see Appendix A), we set up an agreed upon time for phone interview that ranged from thirty to ninety minutes in length. The process was in alignment with the University of Wisconsin River Falls institutional review board IRB protocol.
All interviews were audio recorded on a digital recorder with the permission of the participants. Data was collected via audio recording, transcripts, field notes and photographs. The interview questions were based on the review of literature and the researcher’s interest in conducting interview based on leadership paths, people and Montessori sustainability.

Narrative Interviews

“Narrative interviews are unstructured and typically begin with a wide open-ended question about a participant experience, where the participant is rarely interrupted in the telling of their story “(Stuckey, 2013). The very first question in this research study is more direct in order to recognize and acknowledge the interviewee’s years in Montessori and gives credence to his or her legacy and knowledge. Listed below are the phases utilized during this study for the narrative interviews.

The model used below is recommended by Jovchelovitch E Bauer, (2002. The framework of phases was adapted for each narrative interview.

<table>
<thead>
<tr>
<th>Phases</th>
<th>Rules</th>
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<tbody>
<tr>
<td>Preparation</td>
<td>Exploring the field</td>
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<td></td>
<td>Formulating exmanent questions</td>
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<tr>
<td>1 Initiation</td>
<td>Formulating initial topic for narration</td>
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<td></td>
<td>Using visual aids</td>
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<tr>
<td>2 Main narration</td>
<td>No interruptions</td>
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<td></td>
<td>Only non-verbal encouragement to continue story-telling</td>
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<tr>
<td></td>
<td>Wait for the coda</td>
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<tr>
<td>3 Questioning phase</td>
<td>Only What happened then?&quot;</td>
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<td></td>
<td>No opinion and attitude questions</td>
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<td></td>
<td>No arguing on contradictions</td>
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<td></td>
<td>No why-questions</td>
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<td></td>
<td>Exmanent into immanent questions</td>
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<tr>
<td>4 Concluding talk</td>
<td>Stop recording</td>
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<td></td>
<td>Why-questions allowed</td>
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<tr>
<td></td>
<td>Memory protocol immediately after interview</td>
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Interview Questions:

1. How many years have you been a Montessorian?

2. How were you introduced to the Montessori Method?

3. What roles have you been in professionally?

4. Did you have a mentor? If so, how did they inspire you?

5. What do you recount as your greatest opportunities?

6. What were your most prominent decisions?

7. What have been your best failures?

8. What were your greatest contributions?

9. What are the leadership qualities you value most?

10. Are we creating sustainability within leadership in our Montessori community?

11. What are your thoughts as a Living Legacy recipient on the state of Montessori leadership currently?
12. What do you think is the metamorphosis of a Montessori leader?

13. What are the most valuable resources you would recommend to an emerging leader looking to grow?

14. In your opinion, how do you think current Montessori organizations can support the growth of emerging leaders?

15. How can future Montessori leaders benefit from your wisdom and life experiences as a Living Legacy recipient?

**Researcher Profile**

“Who are you in this narrative inquiry?” (Clandinin, 2013, p.81). I am human. My human curiosity and academic history is contributed to the evolution of this research proposal and paper. Approximately three decades ago, my story began as a student in a traditional early childhood student setting. I was working and studying at a well-known preschool with thoughtful teachers, however my observations, my instincts and my being kept shouting, “there must be another way to assist these children to learn independently.” Nancy Rambusch describes this so eloquently when she notes that, “a teacher teaches children, the directress places the children in direct contact with the content of experience. The role of the directress is to prepare the environment, to insure all the children in it an opportunity to find achievement and satisfaction. She establishes norms of behavior by her own behavior and attempts to incarnate those attitudes she wants to promote in the children” (Rambusch, 1962, p.95).
The following day, I went to my professors and verbally shared that this must not be the profession for me and that I would be changing directions in second semester. They prodded deeper and I shared my direct interpretation of the situation. They looked at each other and one professor said, “You should try one of those Montessori schools.” I accepted what I thought was going to be my second semester challenge. In fact, it was quite the opposite; I found my people. The Montessori Method was and still is home.

My first AMS certificate was earned from MECA-Seton in 1987. I have been a Montessori Early Childhood guide and administrator ever since. In between time I went back to get my Bachelor’s degree in Educational Policy and Leadership-Community Education.

This is actually my second educational journey into the Montessori educational world. I chose to get my Masters of Science in Education-EC Montessori at University of Wisconsin-River Falls. My goal is keep learning so in turn I may share the best and most precise knowledge to future educators in order to guide children in their self-construction. I’m ready to listen deeper, learn deeper and give back.

Coding

The phases of coding used are an adaptation from the model below from Patton (2002).”Narrative inquiry as a methodology entails a view of the phenomenon (Connelly & Clandinin, 2006, p.375). The phenomenon in this case is the life stories and meanings. The phenomenon unveils in the coding and theme development which is guided by the data within the interviews of the participants.

Phases of Coding:

Phase 1: Listen and transcribe audio (includes all selected features- exact wording, message, tone, ex: laughter).
Listen, listen, listen and listen again for accuracy. Make any written needed clarifications each time.

Phase 2:
Note potential quotes and emerging themes. Listen and listen again with a narrative ear. Create new document and continue to code and correlate themes with lines equating each participant. Continue ongoing refinement process of emerging sub themes, themes and quotes.

Phase 3:

Results and Analysis

Participants Narratives: Learning Histories

Living Legacy Leaders provide valuable historical and present day perspectives that emerging leaders can gain knowledge from in order to cultivate and sustain strong Montessori organizations. Learning histories are gathered to guide and give organizations and its members some contemplative wisdom. This collection of lived experience stories is an artifact of reflective thinking can have a significant impact on organizations. Narratives are an important resource for research because “experiences happen narratively. Narrative inquiry is a form of narrative experience. Therefore, educational experiences should be studied narratively" (Clandinin & Connelly, 2000, p19). The human stories we tell represent events, themes and patterns of meaning that happen in our lifetime. Meet the Living Legacies below as their entrance into Montessori is described a snapshot provided of into their Montessori work.

Marie M. Dugan: 2009 AMS Living Legacy Honoree
How did we get here? When the phone rang and a woman’s voice answered with a strong hello I became acutely aware that I was looking forward to hearing that voice. It was Marie Dugan on the other end of the line. Last fall we were previously acquainted by email through a mutual connection. We then immediately talked by phone. I wanted to learn more about leadership growth in Montessori. Marie graciously shared her thoughts and answered all my questions. Somehow I knew we would meet again. So it deems appropriate that she was the first Living Legacy subject to be interviewed. This second call was even more fulfilling because it was a chance to get to know Marie Dugan’s journey in Montessori. How did she get here? Marie Dugan has been involved in the Montessori field for the past 47 years. Forty seven years earlier when she was looking for a preschool for her daughter, Marie began by reading a local article on a Montessori school in Wilmington Delaware. This led her to read even more about Montessori. She lined up a Montessori school, enrolled her daughter and before her daughter even started; Marie received a phone call from the school owner. The school was without a teacher. They would have to close if they could not find a teacher. Knowing that Marie was a teacher, the owner asked Marie to take the job temporarily.

“She asked if I would consider teaching the class until a teacher was found. It was one of those surprises in your life that I never thought about doing. I was new to Montessori. Of course I had taught at an early childhood program. I said I am really going to be disappointed that the class won’t be running. So I said, let’s talk and we did. I decided to teach the class. I realized pretty early on in the year if I was to continue this, I needed my Montessori training. I took the training in Ithaca New York. People asked me why I
stayed so long. It was just an awakening for me. Something I could believe in and make a difference with.”

Marie Dugan

More surprises were yet to come. Bretta Weiss, whom at the time was the American Montessori Society National director telephoned Marie to see if they could do a video at the Montessori school. The resulting film now is in the Montessori archives called “Montessori: An Education for Life.” That is when Bretta and Marie began to get to know each other better and the friendship bloomed. There was an opening on the AMS Board and Bretta encouraged Marie to join. One year later Marie was the President of the AMS Board. Not an easy task for such a young teacher. This is where she found her fundraising niche, a very important skill to have for an organizational entity. The financial stability of AMS was a priority for Marie. Being the Living legacy recipient in 2009 Marie helped raise $100,000 for the teacher education fund. It gave scholarships to 16 Montessori interns passing Montessori knowledge and support along to others.

“Some of the most relevant things I have done were not planned. They just happened.”

Marie Dugan

Marie Dugan did not set out to become a Montessorian. Nor did she set out to be on the AMS Board. Marie has been in a variety of roles. She has been a teacher, head of school, AMS Board President and Board member, master fundraiser, and a Montessori trainer. She is the Chair of the Montessori Archives and is involved with a Montessori musical.

“I think everything that I have done personally has to do with the way I see Montessori. Everyone is in a different place, just like every child. You need to help people where they are. Personal contact with people that are striving to learn.”
Betsy Coe 2008: AMS Living Legacy Honoree

Empower! This was the word is one of Betsy Coe’s key words in her Dissertation. That is what this leader has done and continues to do for others in the Montessori community. Her eloquent laugh made me feel at peace as I began to ask her if she came to Montessori or did Montessori come to her forty four years ago.

“My husband got out of the service and we moved to New Orleans and within a week an insurance man who was essentially trying to sell us more insurance. He said my child goes to a Montessori school. They are having an open house would you like to go? I said yes and I came home with a job. “

A strong legacy is not constructed overnight. It is built on a strong foundation and infrastructure. Betsy’s lifelong learning includes being a public school teacher, a researcher, an advocate for adolescence, an author, speaker and a trained Montessorian who has an understanding of all the planes of development. Basically, Betsy’s lived experience is a combination of research, science and timing. She has the big picture. Listening to Betsy talk about the planes of development, it occurred to me that the pathway for upcoming leaders is actually a leadership continuum.

The time was right to ask about her thoughts on the metamorphosis of a leader. Betsy paused and thought about this question before she responded.

“We are here to continue Dr. Montessori’s work, not to repeat it. I back everything up on research.”
I repeat the question. What is a metamorphosis of a Montessori leader?

“Well I am thinking it comes when people first start Montessori, they are going through the motions. Eventually, they have passion. It becomes embedded in everything they do. Then they become a Montessori teacher.”

Betsy Coe

With inspiration comes motivation. Betsy Coe is definitely fits under the title of being a positive catalyst of growth.

**Judi Bauerlein: 2010 AMS Living Legacy Honoree**

“I am continuously amazed by the power and beauty of Montessori. It never gets old.”

Judi Bauerlein

Judi answered the phone for the interview. I noticed immediately that she has a rich and inspiring strength in her voice. We began the questions regarding her living leadership path beginning with her introduction to Montessori. Again, a story of another serendipitous entrance. In 1959, when Judi was in college a nun encouraged her to go to a lecture on the Montessori Method. The speaker happened to be Nancy McCormick Rambusch. After the lecture Judi declared that when she had children that they would definitely go to a Montessori school.

“Went to the lecture and it was the most sensible thing I had ever heard.”

Judi Bauerlein

After college Judi lived out her wishes and become a Montessori parent. Her resume is lengthy and includes the roles of a Montessori teacher, Montessori trainer, TedX speaker, past AMS President; she has also been a lifetime advocate for peace (on AMS committee).
Since Judi has been in multiple roles of leadership in the Montessori world, I wanted to know if she thought that we are creating sustainability within the leadership in our Montessori community.

“That is a good question. I know the American Montessori Society has just begun the Emerging Leaders Fellowship Program (ELF). This is a wonderful beginning. In the Peace Committee we are also working with the younger ones to be officers in committee too and connect with projects.”

Judi Bauerlein

Her visionary ways struck me when Judi turned the tables and offered a question as an answer.

“Maybe the work brings us to Montessori and that is the sustainability?

Judi Bauerlein

Judi went on to explain what has kept her going and helped her ‘to be present’. It was her work with the children, interns and nature. It made sense that she changed the question around. This work kept her going because it was part of her self-actualization. To be a conscious leader, one must look within and create a mindful relationship with oneself. In order to be present, one must be open to personal and professional growth. One must be able to look introspectively into one’s own respective space and to recognize and be able to personally restore one’s own balance with your own personal stress relievers and life strategies. That was nature for Judi. She asked me if I had ever heard of the book, Sense of Wonder (Carson, 1956). I did not so I looked it up and will share one particular verse that reflects the woman I interviewed.

“I sincerely believe that for the child, and for the parent seeking to guide him, it is not half so important to know as to feel. If facts are the seeds that later produce knowledge and wisdom, then the emotions and the impressions of the senses are the fertile soil in
which the seeds must grow. The years of early childhood are the time to prepare the soil. Once the emotions have been aroused—a sense of the beautiful, the excitement of the new and the unknown, a feeling of sympathy, pity, admiration or love—then we wish for knowledge about the object of our emotional response. Once found, it has lasting meaning. It is more important to pave the way for the child to want to know than to put him on a diet of facts he is not ready to assimilate. (Carson, 1956, p.45)”

As the questioning resumed I was taken by the word choices and the actions Judi was describing. It was a language of respect, a leadership quality and one of a true Montessorian. Our time was winding down and I asked Judi what the most valuable resources she would recommend to an emerging leader looking to grow.

“Observe, reflect on what works for you. Have the willingness to go above and beyond.”

Judi Bauerlein

This is how Judi leads and lives life along with a sense of wonder.

**Carolyn Kambich: 2016 AMS Living Legacy Honoree**

“Each decade has its own changes and growths.”

Carolyn Kambich

We are connected not just by the phone but by a Montessori life. As we enter conversation, her answers and kind voice sound cosmic. Carolyn Kambich was has been connected to Montessori for over 50 years. She went to listen to a speaker from Midwest Montessori Teacher Training Center on the Montessori philosophy. At the time she was in a Moms group. Carolyn was intrigued by this Montessori philosophy. With the prompting of Dr.
Fleege, Carolyn and another parent put out an ad in the newspaper to see if any other parents would be interested in sending their children to a Montessori school. Two hundred responses later a school was formed and eventually two more. She has held many roles as founder, head of school, directress, speaker, advocate, and peacemaker. Internationally she worked to bring Montessori to Uganda.

Carolyn described that she was traveling with her husband to Uganda for a Rotary International microfinance project for women. She met another woman, a wife of a fellow rotary club member. Christine was an elementary teacher in Uganda. She asked what Carolyn did back home in the U.S. The flood gates opened for Carolyn to discuss the beauty of Montessori. Christine was intrigued about Montessori and that it is an education for peace. This was the inception of education for peace in Uganda through the work of Carolyn and Tony, the Ursula Thrush Peace Seed grant and many others. I listened to her story that took Montessori to another part of the world; she then ended the interview calmly by saying,

“I look at myself as a background guide, preparing the environment.”

Carolyn Kambich

Dr. Montessori recognized that the environment is a pathway of transmitting knowledge about the child’s world to the child so they can grow into the person he/she is meant to be. The Montessori Method supports the child with personal human development “In giving an account of the Montessori system it is difficult to know where to begin, because it is hard to single out one principle as more important than the others. In an organism all organs are essential, for each plays a necessary part in the whole. And so it is in the Montessori system, and for the same reason; because it is a living system. It displays that multiplicity in unity which is characteristic of all organisms.” (Montessori, 1962, p.105). Looking at Montessori and its layers of schools
and organizations, I asked Carolyn if she thought current Montessori organizations can support
the growth of emerging leaders. Carolyn shared her reflection on that,

“It is a two way street. The organization provides environment, resources, workshops
and conferences. Individuals have to be awake and recognize the connections are out
there. Reach out to life.”

Carolyn Kambich

John Chattin-McNichols: 2014 AMS Living Legacy Honoree

John answered the phone with a very professional demeanor. He kindly set the pace of
the interview as he was in between helping students at the college. It made me smile because it
was very respectful and authentic just like a Montessori climate.

Like the other interviewees, John had an unexpected entrance into Montessori education
as well. His parents were looking for a school for his brother. They chose a local Montessori
school. His Mom took a job there. When John turned eighteen his Mom mentioned there were
opportunities to do odd jobs independently at the school. He took the odd jobs which eventually
led him to teach summer school. Then in the 1970-71 school years, the school needed an
elementary teacher and John took the job. At this time there was not elementary Montessori
training in the United States so off John went to Bergamo, Italy to pursue his Elementary
training.

As I asked John the roles he has played in the Montessori world, he proudly shared that
he was a teacher. He has been a teacher, teacher educator, College Professor, an AMS Board
President and member, a founder of a teacher education program, author of The Montessori
Controversy (1998) and speaker I intently listened to John’s answers describing his Montessori journey.

John has traveled many roads. There is a lot to look at within leadership and sustainability in regards to John’s journey. It involves relationships, the history and culture of organization, timing, educational resources and the people’s job roles.

“People fall into Montessori all the time. Whether it is as a teacher or an administrator, it is important then to know your strengths and know what you are to lead.”

John Chattin-McNichols

There was sense of trust and accomplishment as he began to share one of his experiences called the Teachers Research Network. It is a program that emulates Montessori’s thoughts on being the guide, the observer and the researcher. John nicknamed this program “the teacher incubator”.

“Another thing I will say is along with Peggy Loeffler and other people, we ran the Teachers Research Network, started by the late Peggy Loeffler. We trained teachers to do action research in their own classroom. We did our first one in 1986.”

John Chattin McNichols

John’s responses were very exciting to me. There will be more research, more current data to prove the Montessori Method and carry on the Montessori movement. Teacher education programs are a streamlined form of information and professional development opportunities for leaders that can create sustainability in Montessori. Fortunately due to these wonderful pioneers the action research now continues throughout training centers and colleges in the United States.
As I sifted through John’s transcribed audio verbiage and looked through his own written articles I ran across this timeless gem that speaks on leadership and to the courageous lifelong learners.

“We Montessorians must lead the movement. Dr. Montessori called her method one of scientific pedagogy. We must continually revisit her writings; as with all of the best writing, there is always something new to be discovered there. But we must also move forward boldly, just as she did. She would have been forthright in her criticism of hours in front of a screen, for example. If we do not or will not speak for the children, who will? (Chattin-McNichols, 2014 p.35).”

Patterns of Meaning

As the interviews came to an end and the data was synthesized, four themes emerged, Authentic State of Awareness, Catalyst of change, Education for Life, and the Peace Model

Authentic State of Awareness

As people we are all unique and complex human beings. Self-awareness is having the ability to develop a deep understanding of one’s whole self. It is an internal embodiment of ones values, reactions, motivations, strengths, weaknesses and ethics. Dr. Montessori would refer to this as inner preparation or spiritual preparedness. . The spiritual preparation is the pathway to authentic self-awareness for a Montessori leader to pursue. I asked Carolyn how an upcoming leader can gain awareness and find resources to grow. She responded.

“Look inward to your higher self and listen. Look into you’re your inner wisdom. Maria Montessori gave us the silence game. Get consciously acquainted with yourself.”

Carolyn Kambich

When considering transformational leadership, being a leader who is charismatic or has an idealized influence on people in their organization is what makes followers stay connected. A transformational leader is in control of their emotions and has clear values others admire and would like to emulate. Servant leaders value, serve and encourage people forward. They are clear within themselves that service to others is part of their being. I asked John his thoughts on how
current Montessori organizations can support the growth of emerging leaders. His response was very reflective on servant leadership.

“John corrected me quickly by thoughtfully saying, “Ok, by that do you mean how are we bringing new leaders up? That’s a good question I think that’s a thing to be raised.”

John Chattin-McNichols

Self-awareness guides one’s decision making process. Awareness and authenticity is a precursor to informed action. It opens up room for one to lead.

Catalyst of Change

Change is a constant in life. Change is often triggered by self-awareness and an authentic state of freedom as your eyes are open to the needs of one self, others or a social reform. In a leadership position one looks at how change affects the organization and individuals within. Collaborative leaders create opportunities for change in schools while they include teachers in the conversation and planning. Servant leaders are driven by their dedication to the change for others that are affected. Transformational leaders take a stance and intellectually bring others in for the cause. All three types of leadership coordinate action when they see the need for change.

Dr. Maria Montessori revolutionized education to a new level by introducing the Montessori Method. Dr. Nancy McCormick Rambusch saw a need for better education in the United States and collaborated with others to make this happen. Both utilized all three models of leadership throughout their charge. John Chattin-McNichols listened to other Montessorians that AMS was in need of a website and that this addition would open up a whole new way of communicating with members. John saw the need of the organization and immediately created
one. Marie Dugan was a young AMS board member and saw they needed funds. She enlisted others and began her fundraising quest. Leaders are catalysts of change.

“When you think about it, it is hard to tell the story what it was like at the beginning. Because it’s almost hard to believe that no one knew, really, honestly no one in Delaware knew anything about Montessori education. We did incredible marketing. We did what people used to do. Coffee in people’s home and bringing people into the school to see. It took 20 years to have a true strong presence in Delaware.”

Marie Dugan

Education for Life

Maria Montessori and her method left human kind with a legacy of powerful knowledge. She provided us with a life teaching method that embraces lifelong learners. Teacher education is a running theme of experiences for all the Living Legacy leaders. Supporting the transformation of the adult is preparing a teacher to respect the child and the process of self-construction.

“The adult students, the quality of working for the greater good in the world. They motivate me.”

Judi Bauerlein

Living Legacy leaders continue their own education and openly teach and inspire others within colleges, Montessori training centers, with interns in the field, with children, parents and the list can go on. This happens in the United States and globally. Each Living Legacy Leader provides transformational, collaborative and servant leadership through their leading professional development workshops, courses and individual guidance within the Montessori culture and in the way life.
“The education that will lead the way to a new humanity has one end alone: leading the individual and society to a higher stage of development. This concept involves many factors and may seem obscure, but it becomes clearer if we realize that mankind has to fulfil a collective mission on earth, a mission involving all of humanity and therefore each and every human being. This concept may enable us to set a definite goal for our efforts (Montessori, 1995, p. 66).” It is a parallel statement reflecting the individual and collaborative work of the AMS Living Legacy leaders.

“It’s almost a personal thing to absorb what Montessori really is. Passion for people….

Leadership is helping people.” Marie

Peace Model

Many people inspired Marie but her voice gleamed with joy when she spoke about Nancy McCormick Rambusch. Marie listened to her speak in 1969 for the first time. She spoke of how dynamic her vision for peace education was. Marie made a courageous move and asked Nancy that very day if she would be willing to come to see her at the little Montessori school. Nancy agreed and helped build the school to a whole new level. An example of collaborative effort and leadership on both parts. That experience created a mentor and a friend. Nancy Rambusch McCormick saw the possibilities in Marie. Using the transformational leadership model Nancy inspired Marie and followed her ideas while encouraging Marie to try new ones. One leader is supporting an emerging leader at the time.

“I think everything that I have done personally has to do with the way I see Montessori. Everyone is in a different place, just like every child. You need to help people where they are. Personal contact with people that are striving to learn.” Marie Dugan
Contexts or places may change when leaders connect with others for a cause Carolyn modeled servant leadership and international peace as she listened to the interest for an educational program that would promote peace education in Uganda. She acted and invited interested Ugandans to take the Montessori training so they could begin Montessori schools in Uganda and continue educating for peace. Carolyn and many others have supported the growing Montessori schools in Uganda by donations and fundraising. Carolyn recognized there was a need and committed herself to serve.

Peace education has no boundaries; it just needs leaders to inspire and motivate others to take action. Betsy Coe is an advocate for adolescence and peace education. She presented at the Hague Appeal for Peace and the United Nations. One of the interview questions was how can future leaders learn from your legacy of wisdom? She responded.

“Just being a model at a distance. Doing the peace work and share what I am doing with the peace work. I have been teaching in Prague, China and Saudi Arabia. You never know where you are going to be doing and where it is going to lead? We share what we are doing at the adolescent level”. We have a commitment to offer the peace model to every country we go and that is hopefully to help everyone understand Montessori.”

Betsy Coe

Conclusion

The four themes; Authentic State of Awareness, Catalyst of change, Education for Life, and the Peace Model are represented through the work of the Living Legacy leaders. It emulates the transformation of the adult. There is a pattern that each theme and the three leadership models; servant leadership, transformational leadership and collaborative leadership do
interchange within Montessori leaders and organizations. It reveals that there is more than one pathway and model in Montessori leadership depending on the individual leader.

**Limitations of Study**

The limitations of this study have been the learning of the actual process of writing the narrative inquiry method. The resources on narrative inquiry are not linear. It is much more complex and layered than I originally had thought. Using narrative inquiry is a different tool than using my norm for data in classroom observations.

This is a small study with minimal subjects due to time and location. Narrative inquiry is a difficult method in which to ensure objectivity. The researcher must always be acutely alert and aware of one’s own bias during the interview and throughout the course of writing this paper and recognize these are story accounts of others.

**Directions for Future Research**

The summary of this paper reflects that the Living Legacy Honorees lived experiences offer invaluable knowledge through their collective visions and have created sustainability represented through their life’s work. This study does not reveal that Montessori uses or needs one specific leadership model or that leadership development follows a formal path in Montessori at this time. It does reveal that servant, transformational and collaborative leadership models interplay within the Living Legacy participant’s leadership continuum. It does raise other questions. Is being a leader constructed in one’s self-constructing cosmic design? Will it happen naturally if we do not have clear opportunities or a prepared environment to be a leader?

My hope from this study going forward is that each Montessori practitioner seeks knowledge from an AMS living legacy leader or another leader within American Montessori Society or their own Montessori community. To be bold, ask questions, take risks, study
Montessori’s archives and writings to widen the conversation. This research study is a call to action to begin a larger intentional process of acquiring knowledge from our American Montessori Living Legacy leaders. Fellow Montessorians are inspired to follow their model by continuing to look inwardly at ourselves, and to create all of our Montessori organizations and the pathways that promote growth in leadership roles.
References


Stuckey HL. Three types of interviews: *Qualitative research methods in social health*. J Soc Health Diabetes 2013;1:56-9

Appendix A: Recruitment Material

Hello, my name is Patty Castillo. I am a student at University of Wisconsin River Falls and a fellow American Montessori Society member. I am conducting a research survey about Montessori Leadership. The exact title is: Montessori Leadership: History, Context and Collective Visons for a Sustainable Future.

There is approximately 5 other participants. The interview process will take approximately thirty minutes to one and a half hours. As the Montessori Method is growing into the public and private school systems, it is important to have leaders to guide this process. You as a Living Legacy leaders have your incredible experience and knowledge to share and this can empower new and upcoming leaders. You and your wisdom are appreciated.

I want to attribute direct quotes to you or use the reference “the Living legacy leader shared.” When I finish all the interviews from everyone who has agreed to participate, I will utilize information in a report and presentation. The answers will not be confidential. The only risk to you might be if your identity maybe revealed. There are no other expected risks to you for helping me with this study.

This research project has been approved by the UW-River Falls Institutional Review Board for the Protection of Human Subjects, protocol # H2016 - T221. And if at any time you have concerns please contact: UWRF-Director of Grants and Research, 101 North Hall, UW-RF, and (715)425-3195.

Your participation in this interview is completely voluntary. This means that you do not have to participate unless you want to.

Do I have your permission to record this interview and begin asking you questions?

Thank you,
Patty Castillo
Appendix B

Patty Castillo’s Research Time Line

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<th>What: What is the research task that needs to be done?</th>
<th>When: By when does it need to be complete?</th>
<th>Who: Patty Castillo (PC) Who will be the point person/organization to make sure this task get done?</th>
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<td>Develop Research Question(s)</td>
<td>October, 2016</td>
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<tr>
<td>Articles 1-9</td>
<td>Sept.-Nov. 2016</td>
<td>PC</td>
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<tr>
<td>Choose Research Method and Subjects</td>
<td>Semi structured Interview and Living Legacy Leaders</td>
<td>PC</td>
</tr>
<tr>
<td>Mind Map 1</td>
<td>October 2016</td>
<td>PC</td>
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<td>Mind Map 2</td>
<td>November 2016</td>
<td>PC</td>
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<td>IRB sent and confirmed</td>
<td>Nov.-Dec. 2016</td>
<td>PC, IRB committee</td>
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<td>Lit Review Draft</td>
<td>December 2016</td>
<td>PC</td>
</tr>
<tr>
<td>Articles 10-12</td>
<td>Jan.-Feb. 2017</td>
<td>PC</td>
</tr>
<tr>
<td>Collect Your Data (based on research methods you chose)</td>
<td>February 20th – April 15th,2017</td>
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<tr>
<td>Enter Your Data</td>
<td>As each interview is completed</td>
<td>PC</td>
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<tr>
<td>Analyze Your Data</td>
<td>As all interviews completed</td>
<td>PC</td>
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<tr>
<td>Finalize Research Paper</td>
<td>April 27, 2017</td>
<td>PC</td>
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<tr>
<td>Present Research Paper and PowerPoint</td>
<td>May 3, 2017</td>
<td>PC</td>
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Appendix C

Coding Subthemes and Final Themes:

- Visionary
- Language of respect
- Conscious leader
- Internal
- Listen
- Peace
- Intrinsic

- Connectors
- Grass roots
- Global
- International
- Evolution
- Respect

- Solution seeker
- Sustainability
- Courage
- Innovator
- Risk
- Lead

- Life long learner
- Mentor
- Researcher
- Archives
- Past and present
- Teacher education
- Montessori