

United Montessori Schools of Indiana

Validation Project Handbook

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UMSI's Mission

With integrity, the United Montessori Schools of Indiana will support, unify and advocate for the advancement of Montessori education.

The Validation Project Overview

The goal of the UMSI Validation Project is to give participating schools the opportunity to demonstrate inclusion of all essential components of a Montessori school. As our definition of generally accepted characteristics of a Montessori program, we have adopted the use of the Montessori Essentials¹. This adoption was informed by feedback from Montessori schools and educators around the state, and formalized through approval by the UMSI Board of Directors in January, 2020.

There is no trademark or copyright protection on the use of the name "Montessori" in the public domain. Any school or program may call itself Montessori but actually be lacking in elements considered Montessori Essentials.

The Benefits

Families

Families can be assured that a Validated program includes the essentials necessary to meet the definition of a Montessori program.

The IN DOE and FSSA

State governmental organizations such as the Indiana Department of Education and the Family and Social Services Administration can be assured that Montessori schools in the state have agreed to a basic standard for defining Montessori through use of standards developed at a national level, as well as a survey that included all the Montessori schools in the state. The survey resulted in 90% of Indiana Montessori school respondents confirming that the Montessori Essentials were the baseline standards for Montessori education. This “standard”, confirmed through Validation, gives licensing and regulatory bodies an accountability measure by which they can ensure the essential components of a Montessori program are met.

¹ The Montessori Public Policy Initiative: a collaboration between AMI/USA and AMS. *Montessori Essentials*. November, 2015.

Montessori Schools

Indiana Montessori schools can be assured that the use of the name “Montessori” in the state has meaning. Validated schools present a threshold level of essential Montessori components that will assure families and state agencies that they can be trusted to provide an authentic Montessori education.

UMSI Validation Project Standards

UMSI has chosen to use the MPPI Essentials as our Validation standards, a document resulting in a collaborative effort on the part of Association Montessori International/USA (AMI/USA) and the American Montessori Society (AMS). For further information on this document’s history, please visit www.montessoriadvocacy.org.

UMSI Validation is an opportunity open to all Montessori schools in good standing with Indiana licensing and regulatory agencies. By applying for validation, you are affirming that you are in compliance with all Indiana laws and regulations, and that you understand UMSI cannot be held liable for oversight or regulation in these areas.

Standards included in the MPPI Essentials are as follows

(<https://montessoriadvocacy.org/wp-content/uploads/2019/07/MontessoriEssentials.pdf>):

- “A classroom design that is compatible with Montessori “prepared environment” principles.
- A full complement of Montessori materials for each class and age group.
- Uninterrupted Montessori daily work periods, with 3-hour work periods being the ideal. Instruction characterized by a high degree of freedom given to the student to choose what to work on, where to work, and how long to work.
- Instruction that primarily takes place in small groups (Elementary and Secondary) or one-on-one (Early Childhood).
- Having a lead teacher in each classroom with an AMI, AMS, NCME , and/or MACTE accredited teacher education program credential at the level being taught.
- Having staff members engage in ongoing Montessori professional development.
- Have classrooms with the appropriate multi-aged groupings: 2.5/3-6, 6-9, 9-12, or 6-12 years of age. Children from birth to 3 years of age and 12-18 years of age may be grouped in varying multi-age configurations.
- With class sizes and adult/child ratios that align with Montessori principles. Montessori classroom standards require larger class sizes and higher student to teacher ratios than is typically seen in traditional classrooms. Adding additional teaching staff to a Primary classroom can interfere with, rather than encourage, child-directed learning. It would not be uncommon to see 30 or more children in a classroom at the early childhood and elementary levels.
- Assess student progress through teacher observation and detailed record keeping”

UMSI Validation Project Policies

1. All Montessori schools in Indiana are eligible to participate in the project. The project will initially include Montessori Infant/Toddler, Primary Early Childhood, Elementary I, and Elementary II classrooms.
2. Private, public and charter Montessori schools may participate.
3. The application fee for validation is \$100.00 per level. The school is responsible for reimbursement to UMSI for Verification Team member expenses incurred (mileage and lunch) while visiting a school.
4. All coordinators, all Verification Team members, and the Validation Committee are trained and clearly understand their role and responsibilities. Each volunteer in a position is required to sign a Confidentiality and Code of Conduct Form and will not

share any information regarding a school with anyone not working directly with the Validation Project.

5. The Verification Team members are fellow Montessori educators who hold a credential from a MACTE-accredited program and have a minimum of three (3) years of classroom experience in the level of classroom they are observing. They are not observing to judge, assess quality, or consult with school staff.

6. Verification Team On-Site Visits are strictly to verify that the information and documentation provided in the School Questionnaire is accurate.

7. A school's validation is in effect until September 1st of its fifth year. Each validated school will be required to complete an annual checklist to maintain validation status. The school may maintain its validation without an additional on-site visit unless there are substantial changes in documentation such as a new director, a change in building, or changes to the structure of the program (additional levels or classroom) or standing with the Indiana Department of Education or FSSA.

8. A school must participate in the full process every 5 years for renewal of its validation.

Process for School Participation

A Montessori school that voluntarily chooses to participate in the UMSI Validation Project will complete the following steps. Schools should expect the Validation process to take 8-16 weeks from submission of the School Validation Questionnaire.

1. School completes the UMSI Validation Project Application (available at umsindiana.org) and submits for review by the Project Coordinator.

2. When the completed application and payment have been received by UMSI, the school will be sent the electronic School Validation Questionnaire within one (1) week of receipt. Schools have one calendar year to submit their School Questionnaires or their application expires without refund.

3. The school will complete the School Validation Questionnaire and return it to UMSI with all required supporting documentation including copies of lead teachers' Montessori credentials, teacher narratives and questionnaires, classroom rosters, classroom daily schedules, and materials inventories.

4. The Validation Committee (consisting of the Project Coordinator, Verification Team Coordinator, and the Approval Coordinator) will review all information received. If complete, the Verification Team Coordinator will send submissions to the Verification Team. If the School Questionnaire packet is not complete, or the school does not meet the essential standards to become validated, the Project Coordinator will let the school know what is needed prior to the onsite visit or connect the school with mentorship resources.

5. The Verification Team Coordinator will contact the school to schedule an on-site visit date to occur within eight (8) weeks of confirmation that the School Validation Questionnaire submission is complete.

6. The Verification Team will complete an on-site visit and accompanying Verification Report to attest that the information submitted in the School Validation Questionnaire is accurate and that the classroom philosophy and curriculum implementation are consistent with UMSI Validation Project Standards.

- a. Please expect one verifier to need time (5-20 minutes) to speak to a Lead Teacher of the classroom to ask questions about the observation or materials list. We understand how busy classroom teachers are and will keep our conversations to a minimum.

7. The Verification Team will submit their reports to the Verification Team Coordinator within two (2) weeks of their on-site visit.

8. The reports will be reviewed by the Validation Committee within weeks five (5) weeks of the on-site visit for final approval.

9. After review, the school will be notified of its Validation status within one (1) week and will be sent a Certificate of UMSI Validation by the Approval Coordinator. All invoices regarding validation must be paid before a certificate will be sent.

Validation Project Steps Timeline

Steps Time Frame Validation Representative Submit application & fee Project Coordinator School questionnaire & documentation

Within 1 week of application Project Coordinator

On-Site Visit Within 8 weeks of questionnaire

Verification Team Coordinator

Verifier Team Report Within 2 weeks of visit Validation Committee Approval for Validation Within 5 weeks of report Validation Committee Certificate of Validation Within

1 week of approval Approval Coordinator

Validation Project Roles and Responsibilities

All representatives of the Validation Project are volunteers from the Montessori community who donate their time in support of quality Montessori education in the state. The whole Validation Committee ultimately votes on Validation approval for schools, and members of the committee also serve in specific roles during this process.

Validation Committee

The Validation Committee consists of the Project Coordinator, Verification Team Coordinator, and Approval Coordinator. Their duties are as follows.

APPROVAL OF SCHOOL VALIDATION QUESTIONNAIRE SUBMISSION

- The Validation Committee generates a recommendation, based on the School Validation Questionnaire, regarding a school's readiness for an on-site visit. APPROVAL OF VALIDATION RECOMMENDATION

- The Validation Committee votes on final approval of Validation for an applicant school.

Project Coordinator

The Project Coordinator is the overall administrator of the project, and the following items are his/her responsibilities.

PROCESS APPLICATIONS AND SCHOOL VALIDATION QUESTIONNAIRES

- Applications received by the Operations Manager through the website are forwarded to the Project Coordinator.
- The Project Coordinator reviews all applications received, verifying payment receipt.
- Project Coordinator sends the School Validation Questionnaire to the school's representative (as noted on application) within one (1) school week of receipt of the application.
- Project Coordinator reviews the completed School Validation Questionnaire and supporting documentation, using the Validation Project Rubric. If any piece is

missing, or the project standards are not met, the coordinator will contact the school to communicate needs and/or status or to connect the school with mentorship resources.

- If the School Questionnaire is complete and all documentation is provided, the Project Coordinator sends the School Validation Questionnaire and any pertinent information to the Validation Committee.

ANNUAL STATUS CHECKLIST FOR VALIDATED SCHOOLS

Montessori schools which are accredited by AMS, IMC, or MEPI or recognized by AMI are exempt from the Annual Status Checklist requirement.

The Approval Coordinator sends the Annual Status Checklist to all validated schools in July, due by September 1.

- Approval Coordinator confirms receipt of Annual Status Checklists and follows up with schools that have not submitted the checklist by the deadline.
- Any school checklists which note significant changes will be sent to the Validation Committee for discussion. A school may be asked to re-validate if changes are deemed to affect a school's adherence to the UMSI Validation Project Standards.

Verification Team Coordinator

The Verification Team Coordinator is responsible for training verification team volunteers and scheduling and facilitating on-site visits, including coordinating travel reimbursements.

COORDINATING ON-SITE VISITS

- Upon recommendation by the Validation Committee, the Verification Team Coordinator notifies the school of its approval for an on-site visit and gathers information from the school regarding preferred dates and/or hours.
- The Verification Team Coordinator schedules the appropriate number of available trained, qualified volunteers and notifies the school of the on-site visit date, including necessary information on visit logistics.
- Verification Team Coordinator sends the confirmed visit schedule, the School Validation Questionnaire and rubric, Materials Checklist, Verification Team Report, Verification Team Member Reimbursement Form, and the Verification Team Member Code of Conduct to the Verification Team.
- The Verification Team Coordinator confirms receipt of signed Codes of Conduct from all Verification Team Members.

- The Verification Team Coordinator receives all Team Member reports and reimbursement forms within two (2) weeks of the on-site visit.
- Verification Team Coordinator reviews reports for completion and sends them to the Approval Coordinator and reimbursement forms to the UMSI Treasurer. Verification Team Members can expect reimbursement from UMSI within two (2) weeks of their on-site visit.

TRAINING VERIFICATION TEAM MEMBERS

- The coordinator sets up 3 one hour live training sessions per year. These sessions will be online.
- The coordinator will ascertain that verifiers have been trained and worked as a lead teacher for that age group for 3 or more years.
- The coordinator will go through the process and steps of being a verifier. The coordinator will go through the handbook, guidelines and obtain a signed Code of Conduct agreement with the verifiers.
- The coordinator will be able to answer questions from the verifiers during the process.

Approval Coordinator

- Approval Coordinator reviews Verification Team Member reports and follows up with the school regarding remaining questions or concerns.
- Sends recommendation and any pertinent information to the Validation Committee.
 - If Validation is not currently recommended, an Action Plan is created with school representatives, outlining goals and timelines. Upon completion of these goals, the school will notify UMSI and request consideration for an on-site visit and continuation of the Validation process.
 - If Validation is approved, the Approval Coordinator will confirm receipt of all payments (including travel reimbursement invoices) and send a Certificate of UMSI Validation to the school.

VALIDATION EXPIRATIONS

- The Approval Coordinator will track school Validations and expiration dates.

- As schools approach expiration, the Approval Coordinator will send a reminder email with a link to the renewal application.
- The Approval Coordinator will also send the annual confirmation checklist for schools, through which the school assures there have been no pertinent changes to their school that would affect their validation status.

Verification Teams

The Verification Teams are a minimum of two Montessori educators with at least 3 years of experience at the classroom level they are observing (one pair of observers for up to two classrooms). These teams complete an on-site visit to verify that the information submitted in the School Validation Questionnaire and accompanying documentation is accurate. Their responsibilities are as follows.

1. Verification Team Members review the School Validation Questionnaire prior to the on-site visit. Team Members should pay particular attention to any standards not mentioned in the questionnaire narratives and observe these standards in practice during the on-site visit, recording observations.
2. The Verification Team Coordinator will facilitate a mutually agreeable time for a work period visit.
3. Verification Team Members confirm that all information provided by the school is accurate by observing the classroom, recording observations and examples for the Verification Team Member Report, and completing the materials inventory.
4. Within two (2) weeks, each team member must submit their completed Verification Team Member Report to the Verification Team Coordinator. Include with submission any Verification Team Member Reimbursement Form for mileage and a meal (up to \$15).

Validation Project Levels

Accredited/Recognized Montessori Schools: Montessori schools that are accredited by AMS, IMC, or MEPI or recognized by AMI can apply for an automatic Certificate of Validation (with no fee) by submitting a copy of their accreditation or recognition with their application. In addition, if a school has been Verified through AMS, this ensures that the school demonstrates the Montessori Essentials and qualifies the school for automatic validation.

Validated Montessori Schools: Montessori schools that successfully complete the UMSI Validation Project will receive a Certificate of Validation and will receive all available benefits of Validation from the IN DOE and/or FSSA.

Mentored Montessori Schools: Montessori schools who would like to complete the UMSI Validation Project but who do not yet meet all criteria for validation may request to work with the Approval Coordinator to develop a Validation Action Plan with a time frame for preparing the school in order to complete the Validation Project.

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