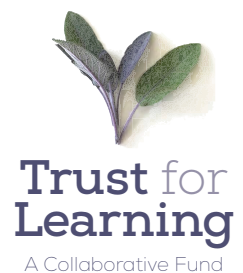


Montessori Leaders Collaborative: Building Bridges

A Summative Evaluation

This evaluation was commissioned by Trust for Learning
and prepared by Sheherazade Hirji, June 2014.



“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”

– Margaret Mead

In 2011, two education grantmakers came together in shared frustration and optimism.

Their frustration was based on a strong belief that although the national “achievement gap” could be erased by building on a child’s peak potential for learning in the earliest years of life, through a student-centered learning experience that fosters a broad range of “21st century” skills, they observed repeatedly that this was not where education reform was heading.

Their optimism was centered on the knowledge that Montessori, the education model they had chosen for their own children, offered precisely this opportunity as well as great potential for replication and for providing equality of experience for students across a wide socioeconomic spectrum. They could see that there were countless others who shared their insight and excitement, and that if cultivated, this latent potential could translate into significant momentum for expansion and outreach to greater numbers of children, particularly those in failing systems who needed it most.

Intrigued, they were prepared to make an investment that could build on this existing energy. Upon closer inspection, however, they found that decades of inward focus, infighting, limited capacity, and a tangle of public misperceptions, had relegated Montessori to the fringes of the education sector, hobbling its growth as a movement that could effectively express and advocate for the needs of developing children. Fortunately, they were undeterred and they proceeded to make a focused and strategic investment in a small group of stakeholders—later to be known as the Montessori Leaders Collaborative (“MLC”). In just three years, this investment yielded outcomes that many had considered impossible—a network of constructive relationships and a collaborative, strategic agenda that would raise all ships in a growing and strengthening Montessori movement.

The stakeholders involved—many of them with decades of experience in the Montessori arena—characterized the MLC conversations as groundbreaking and critical to building an inclusive and

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What was needed was a neutral convenor to facilitate this complex bridge-building process.

persuasive platform from which Montessori can begin to influence the national education discussion and bring its developmentally appropriate framework for education to significantly greater numbers of children from all walks of life.

This Report, based on a review of the process and resulting materials, as well as interviews with all of the participants, presents an independent evaluation of how Trust for Learning convened and launched the MLC, and of its potential and challenges going forward.

GENESIS

Well-versed in both Montessori and the mainstream education reform movement, grantmakers Marianna McCall and Laurie McTeague (the “Founders”) were convinced that Montessori was a necessary, but absent, voice in the national education debate. The education sector was finally beginning to recognize the need for individualized learning and cultivation of a broad set of social-emotional and executive functioning skills and it would seem that the sector was ready to embrace Montessori—a comprehensive, time-tested, and replicable curriculum designed to meet these goals; further, a widespread network of dedicated practitioners seemed poised and eager to reach out to even greater numbers of children.

However, the Founders’ early attempts to advocate for Montessori with funders and policymakers proved difficult, as myths and misperceptions about Montessori methods, as well as the lack of data on student outcomes, made for a skeptical audience. At the same time, the Founders’ experience as Montessori parents told them that Montessori also needed greater credibility and more efficient, effective and coordinated messaging from within. Given this perspective from both inside and outside the Montessori movement, and their desire to help this promising method reach more children, the Founders began looking for action they could take on Montessori’s behalf.

Marianna and Laurie each had a small family foundation with modest capacity. They knew their efforts would have to be very strategic, so they engaged Stephanie Miller of Miller Philanthropy Craft to advise them on the most effective way to leverage any investment.

Stephanie first undertook a landscape analysis to answer a simple question—“Where would resources best be placed in order to support and grow this movement?” The results confirmed that while the Montessori movement was content rich, it was system poor—there was no control over the Montessori name or “brand”, no coordinated communication effort to promote the method on public or policy agendas, little data defining the scope of the movement or the efficacy of its outcomes, little collaboration among numerous state and national organizations, and a leadership that was divided along some historic fault lines, primarily that which divided groups based on their perceived

allegiance to the Association Montessori Internationale (AMI) or the American Montessori Society (AMS).

Based on this information, Stephanie concluded that there was no obvious fulcrum for a strategic investment, nor any single organization that could raise the profile of Montessori on its own. Her recommendation was that unless Montessori could demonstrate that it was a unified, credible model of education, it would be impossible to bring Montessori to the policy table or significantly increase its reach.

Stephanie also offered a possible path forward—to convene the leaders and see if they were ready to explore a collaborative movement with a unified voice. Though risky, this was not entirely wishful thinking—in her interviews, Stephanie heard that previous attempts to bring the groups together had failed to yield lasting results; but she also heard a groundswell of awareness that the culture of competition was hurting Montessori and limiting its potential impact on behalf of children, and she sensed there was a strong readiness to leave that behind—what was needed was a neutral convenor to facilitate this complex bridge-building process. Combined with the energy of dedicated people in the Montessori world doing incredible work, this readiness suggested a possibility of success where other efforts had failed.

Having done similar convening work before, Stephanie was realistic about the challenges in creating cohesion amongst disparate groups. While not insurmountable, the project would require a laser-sharp focus, a willingness to step on organizational toes and significant staying power.

This landscape analysis would have deterred many funders, even those with significant resources and experience in undertaking and underwriting this type of work. Instead, it provoked the Founders’ curiosity—Why couldn’t something that worked so well in the classroom become a cohesive and powerful force in advocating for children? Was this the right moment in time for the leaders to enter into a new level of dialogue, so they could have a collective impact on the unfolding discussion about how to improve education in America? Though it was unclear exactly what effort or resources it would take, and what results it would yield, the Founders decided they could not walk away—the cost of the lost opportunity far outweighed the potential investment in convening the leaders and the benefit of helping propel a movement that seemed ripe for success.

PROCESS

In 2011, the Founders prepared to convene the leaders of six major Montessori organizations with national reach, as well as several individuals who had demonstrated willingness and capacity to work collaboratively across organizational boundaries. They did not underestimate the enormity of the task and the extremely high risk of

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By the end, they had launched an important dialogue, with the stage set for a respectful discussion and exploration of mutual interest, and a future-focused environment that acknowledged the past, but was not limited by this history.

failure. To create conditions for success, they retained Stephanie Miller along with Michael Randel, an experienced and capable facilitator, to help build the conditions for an effective dialogue.

The agenda of that first meeting was simply a conversation—a chance to explore common ground and the question of whether the Montessori movement had an appetite for addressing its challenges and assessing its state of readiness for a bolder future. This was not about what the Founders wanted; this was about what was possible and needed for the Montessori movement.

The first two-day meeting was held in December 2011 in New York. The participants each brought a measure of experience and authority that would allow them to speak for a constituency, identify its assets and understand the conditions holding it back, and all 11 leaders agreed that it was a historic gathering. At the outset, the goal of some participants was simply that they would all “come out alive.” But the opportunity to have a neutral platform and an open agenda enabled by a skilled facilitator, created a uniquely safe space in which common interests and goals could be found. By the end, they had launched an important dialogue, with the stage set for a respectful discussion and exploration of mutual interest, and a future-focused environment that acknowledged the past, but was not limited by this history.

The attendees deemed the meeting a success. It was clear that the group had a lot of work to do, but there was enough hope coming out of this first meeting to suggest that there was indeed appetite for change. The Founders felt strongly that it was worth continuing to invest in this process, even though the scope and magnitude of the challenge remained daunting.

Following this first meeting, the group named themselves the Montessori Leaders Collaborative (“MLC”) and developed a regular schedule of face-to-face and electronic meetings. Recognizing that some additional voices were needed, they also continued to develop and expand their membership. As of June 2014, this diverse group (which had never met all together prior to the MLC) had met in person seven times to envision collectively for the future; in between each of these sessions, they had at least one virtual meeting to provide updates on collective action and other news from the field, and to prepare future agendas. They also engaged in an active listserv, which allowed for ongoing communication and sharing of resources, as well as vibrant, and sometimes pointed, discussion.

Meanwhile, the Founders formalized their commitment to support this process by forming Trust for Learning, a collective action fund designed to “give voice and support to innovative approaches in education that are grounded in research in brain development and how children naturally learn.” Stephanie Miller was hired as Executive Director. Over two and a half years, relationships and trust continued to deepen and a platform for collaborative, strategic action gradually began to emerge.

OUTCOMES

Outcome #1—The Trust created a safe space from which the MLC could arise, from a very tentative first meeting to a productive, ongoing community.

Over two and a half years, members of the MLC were grateful for ongoing opportunities to build relationships and collective goals, as well as their capacity as a movement. Although there is some continued uncertainty within the MLC about the ongoing evolution of its membership, function and priorities, and the Trust’s priorities, they cited Randel Consulting’s “brilliant” facilitation, and the Trust’s ability to let the conversation unfold without directing the process toward a specific outcome, as critical success factors that allowed for the development of genuine trust among the group. At the same time, the MLC remains fragile and continues to rely on the Trust as neutral facilitator. Only two interviewees thought that if the Trust withdraws support, the MLC would be stable and strong enough to carry on in a sustainable way.

Outcome #2—With skilled facilitation and guidance, the MLC defined a series of long-term strategic program goals to bring a collective vision to fruition, in areas such as, Research, Early Childhood Education, Communications & Advocacy and Teacher Training.

Within nine months of the initial convening, the MLC agreed to focus on a series of collective program directions. A guided “blue sky” visioning process helped the MLC see that the Montessori movement suffered a “poverty of thinking” and that its goals were out of sync with what needed to be accomplished. The convenings supported by Trust for Learning encouraged them to think big for the first time, as well as to establish trust in the idea of working together on collaborative projects. The process of developing priorities was followed by an implementation plan, in which cross-organizational working groups were formed to tackle the following issues:

Research: MLC members acknowledged that the movement did not have a clear picture of itself—how many schools exist, how many are public, how many students are served, etc. Therefore:

- MLC members proposed a nationwide census, as well as a research project to measure Montessori’s impact on cognitive and non-cognitive skills, and an ethnographic study of four exemplar programs that were using Montessori in low-income communities with outstanding results.
- Trust for Learning made a grant toward the census and research project. The census is ongoing, but already provides a first-ever



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snapshot of Montessori assets in the United States. Outcomes testing is currently underway.

- In an effort to measure results more meaningfully, the researchers are working with the National Institute of Early Education Research (NIEER) to develop a new Developmental Education Rating Scale (DERS) that is the first early education rating system to correlate features of the classroom environment with desired student outcomes.

Focus on early childhood education from birth to 6: Consensus emerged that Montessori offers uniquely strong insight and capability in aiding the development and education of the very youngest children, as well as their parents. Several members noted the success of four exemplar programs, which were providing Montessori education for ages birth-6 together with various combinations of parent education, home visitation, infant care and wraparound health or social services. These programs all serve low-income communities and achieve outstanding results and the MLC felt they could be used as a model for effective outreach and programming on a much wider scale. Drawing on the ethnographic study mentioned above, the working group has developed a formal proposal for launching a Birth-6 Family Community Centers Model that will initiate new program starts, as well as a network of existing and future providers of the model. The Trust is currently aggregating funds to support this proposal.

Communication & Advocacy: Although some MLC participants were already engaged in state level advocacy efforts, the Founders' access to national-level funders and policymakers brought a new emphasis on advocating for Montessori in a cohesive way. Among other things, the Trust funded:

- a collaborative AMI-AMS project to identify and connect existing state advocacy networks;
- the retainer of a communications firm to interview MLC members and distill the messages they could collectively agree on and convey;
- the hiring of the Neimand Collaborative, a national-level social marketing, policy and communications firm to advise the MLC on how best to employ these messages.

Teacher Training: The process of training teachers is an issue that has deeply divided Montessori groups in the US. The schism is largely ideological, grounded in the tension between preserving versus adapting the original Montessori method. But it is also a business issue, as the income stream of both AMS and AMI (the two largest providers of training) depends on promoting their own model. The issue is a major obstacle to cooperation across organizational lines, as well as to effective quality control and greater credibility with parents, funders and policymakers.

Although the Founders had been advised to avoid this "third rail" issue, the MLC itself chose to examine it. Realizing that there were challenges with the teacher pipeline—both a shortage of trained teachers and in some training centers, a glut of unused training potential—the MLC initially sought a greater understanding of the movement's teacher training resources. With the assistance of the Montessori Accreditation Council for Teacher Education (MACTE—an MLC member), the working group compiled extensive data on the training resources that currently exist. From this work, the group later developed a proposal for a unified website called TeachMontessori.org, which would be a one-stop shop for prospective teachers to obtain information on the why and how of undertaking Montessori training. The Trust is currently aggregating donations to fund this proposal.

Outcome #3—On July 31, 2013, the MLC entered into a formal collaborative agreement that set out the terms of engagement for how the group was going to strive for achieving its collective vision of "re-imagining education to meet the needs of our children through the implementation of high-quality Montessori."

The MLC entered into a comprehensive framework for continuing engagement; the final agreement was signed against the backdrop of the International Montessori Congress in Portland, Oregon in July 2013 and reflected the group's commitment to "increasing access to this rich, time-tested, replicable model of developmentally appropriate education."

The articulation of a shared vision and commitment by all participants, including the organizations that were perceived to be the root of the historic divide, was unprecedented. The Agreement reflected the inclusion of a diversity of voices and experiences, affirming that Montessori was not a monolithic concept, but rather, comprised a pluralistic perspective that could be and had been adapted to evolving realities and differently able populations across socio-economic levels, while retaining the core values and principles on which Maria Montessori's methods were based.

Outcome #4—Montessori is attracting increased interest from funders as a quality education model.

According to Foundation Centre, approximately \$1.79 billion was directed toward elementary and secondary education in 2011 by the top 1000 foundations in the United States. No data is available as to what portion of this goes towards Montessori, but it is generally understood to be a minute fraction of this amount. In part, this can be attributed to the perception that Montessori is a system only for upper-income children who have strong family support and whose parents can afford to pay privately. The forgotten reality is that Maria Montessori's early



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work began with children in the slums of Rome and currently, there are almost 500 public Montessori schools across the US serving students from a variety of socio-economic backgrounds. But this and other misperceptions persist because the Montessori movement simply has not had the tools nor the capacity to seek significant funding that would help build a comprehensive communications strategy or propel and sustain its reach.

To address this paradox, the Trust actively supported MLC’s capacity to develop and circulate fundable proposals:

- The Trust offered strategic planning assistance, facilitated convenings of the working groups with others in the broader movement, and gave targeted feedback that helped MLC “think big” and develop strategic proposals.
- At an April 2014 convening, the Trust structured a discussion with several independent funders, including The Harold Simmons Foundation and The Walton Family Foundation, to help the MLC understand what funders are looking for and to solicit reactions to proposals under development. The Trust also engaged the Neimand Collaborative to advise the group on effective messaging and help them envision a comprehensive, coordinated communications campaign.
- The Trust alerted the MLC to Federal funding opportunities and specifically urged them to apply for an Investing in Innovation (i3) Grant from the U.S. Department of Education. The Trust then gave a grant to enable the National Center for Montessori in the Public Sector (an MLC member) to prepare and submit a highly collaborative application drawing on multiple training centers, Montessori charter schools and public school districts. Regardless of its ultimate success, the application built experience in developing collaborative proposals and increased visibility of Montessori within Federal funding circles.
- Once the MLC had committed to a collaborative process and devised some strategic goals, the Founders began to approach additional partners to join them in this groundbreaking work. Serena Connelly of The Harold Simmons Foundation was a significant early adopter whose investment helped validate the work. Trust for Learning also built partnerships with The Walton Family Foundation, Joan Lombardi, David Nee and the William Caspar Graustein Memorial Fund, the Lynch Foundation, Ania Czekaj-Farber, and SeaChange, an organization dedicated to fostering collaboration among non-profit organizations.
- The Trust worked to elevate Montessori into national-level conversations on education reform, leveraging a funder-to-funder approach to communicate and raise credibility on behalf of the movement in forums such as Grantmakers for Education, New Schools Venture Fund, and Council on Philanthropy. The Trust

presented a Montessori research project at the Clinton Global Initiative’s working group on early childhood education and built on budding relationships with like-minded funders (including Stranahan Foundation, Buffett Early Childhood Fund and New America Foundation) to create a second convening of high-quality early childhood education providers, in which Montessori representatives were included as participants.

MLC participants recognized that, as individual organizations, they did not have the capacity to engage in forums like the Clinton Global Initiative or to reach out to funders such as the Walton Family Foundation or the Gates Foundation. Working with MLC made them realize that, as a coordinated group supported by the Trust, they could potentially access a broader network of funding and support for their work. Therefore, the Trust’s ability to connect Montessori to the philanthropic community was a tremendous value-added benefit.

In interviews, MLC participants were clear that the Trust’s support had brought them to a place where the time to seize a transformative Montessori moment seemed imminent and possible. To the question “Would this impact have happened without the Trust providing the spark that it did?”, the responses ranged from “absolutely not” to “not in the same way” and “eventually but we may have lost a generation by then”, or “not a chance, Montessori has had its head buried in the sand.”

Outcome #5 – Building a cohesive collaborative of Montessori leaders, supported by a separate collaborative of funders, resulted in a significant return on a relatively modest investment.

In venture philanthropy, the idea is almost more important than the level of funding. At its core, the Founders’ goal was to change the trajectory of public education toward a developmentally appropriate model that begins in the earliest years of a child’s life. To tackle a challenge of this magnitude would be difficult, if not impossible, for even the largest of foundations. Guided by Stephanie Miller however, the Founders identified a targeted intervention that would enable limited resources to unleash maximum impact:

- If they could not immediately change the trajectory of public education, they could elevate a specific model – Montessori – to demonstrate the power of high-quality developmental education deployed in a child’s window of maximum learning potential, in hopes that a vision of the possible would begin to change the investment priorities of other funders, including State and Federal governments; and
- If they could not immediately change Montessori’s culture of competition and inward-focused thinking, they could build the capacity of a targeted group of stakeholders to collaborate and

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turn their perspective outward to the national discussion on education reform.

After a total investment of roughly \$1 million dollars over three years, the Trust can count some significant successes, as described throughout this Report. In philanthropic terms, this is a relatively minor investment over an extremely short period, making the results all the more impressive.

Equally impressive is the fact that the Trust is structured as a collaborative of funders. By combining forces around an aligned strategy, the investment of each individual is amplified and leveraged to have even greater impact than any independent action; not only is there a greater number of dollars invested, but the collective intent creates greater momentum that propels larger initiatives, as well as credibility for the overall effort. It is worth noting, however, that while managing a collaborative initiative is a significant challenge, managing a collaborative initiative within a separate, funder collaborative requires a level of expertise, sophisticated management experience and enlightened philanthropic thinking that is rare. The Founders’ and Executive Director’s ability to embrace this strategic direction and maintain a sharp focus on its execution, as well as a flexible approach to its evolution, is a significant credit to the team.

Interestingly, it is not clear that additional funding resources would have significantly changed the outcomes achieved to date. Indeed, additional resources may have made it more difficult to maintain focus on the convening of the MLC. Going forward, however, additional funding would help sustain the growing MLC desire for collaborative work and accelerate a number of its strategic initiatives.

CONCLUSION

Trust for Learning’s modest investment in the Montessori Leaders Collaborative has produced extraordinary results: a 100-year old philosophy is starting to look and think more strongly like a movement in the United States; MLC working groups are producing tangible results; and the entire MLC benefits from strategic resources and professional development opportunities, as well as the Trust’s ability to leverage additional funders through a funder-to-funder movement-building approach.

These collective efforts are slowly but effectively enabling Montessori to enter into the national education debate in the United States and set itself up for recognition as a truly effective system..

Much of the credit for the success of the MLC goes to the Founders for recognizing and pursuing the spark of opportunity that Montessori represented to them, and for investing their philanthropic resources into the Trust. They were passionate and informed risk-takers, and

they were able to see their own limitations and seek help. They did so by engaging Stephanie Miller to lead this initiative. Her ability to think strategically and manage and drive the investment in MLC played a huge part in its success, as did her ability to assess what this initiative, comprising the two collaboratives, needed as critical ingredients. The Trust was also fortunate to find Randel Consulting Associates, whose award-winning facilitation skills helped build trust among the participants and provided forward momentum for what was a predictably challenging conversation and process, as well as The Simmons Foundation, whose significant early investment validated the work at a critical stage. Together, they forged a thoughtful, methodical approach that prepared the MLC for success.

The Trust has accomplished something for which philanthropy routinely strives, but rarely achieves to such a degree and with such significant impact. That this is their first venturing out in philanthropy makes the accomplishment even more noteworthy. It is not perfect and the work is far from complete, but the story of Trust For Learning’s smart, savvy and strategic approach is a grantmaking story worth celebrating and sharing widely.

With continuing evolution and attention, the Trust can consolidate its investment in the MLC and look forward to charting new paths, with confidence in fulfilling its vision of giving “...voice and support to innovative approaches in education that are grounded in research in brain development and how children naturally learn.”

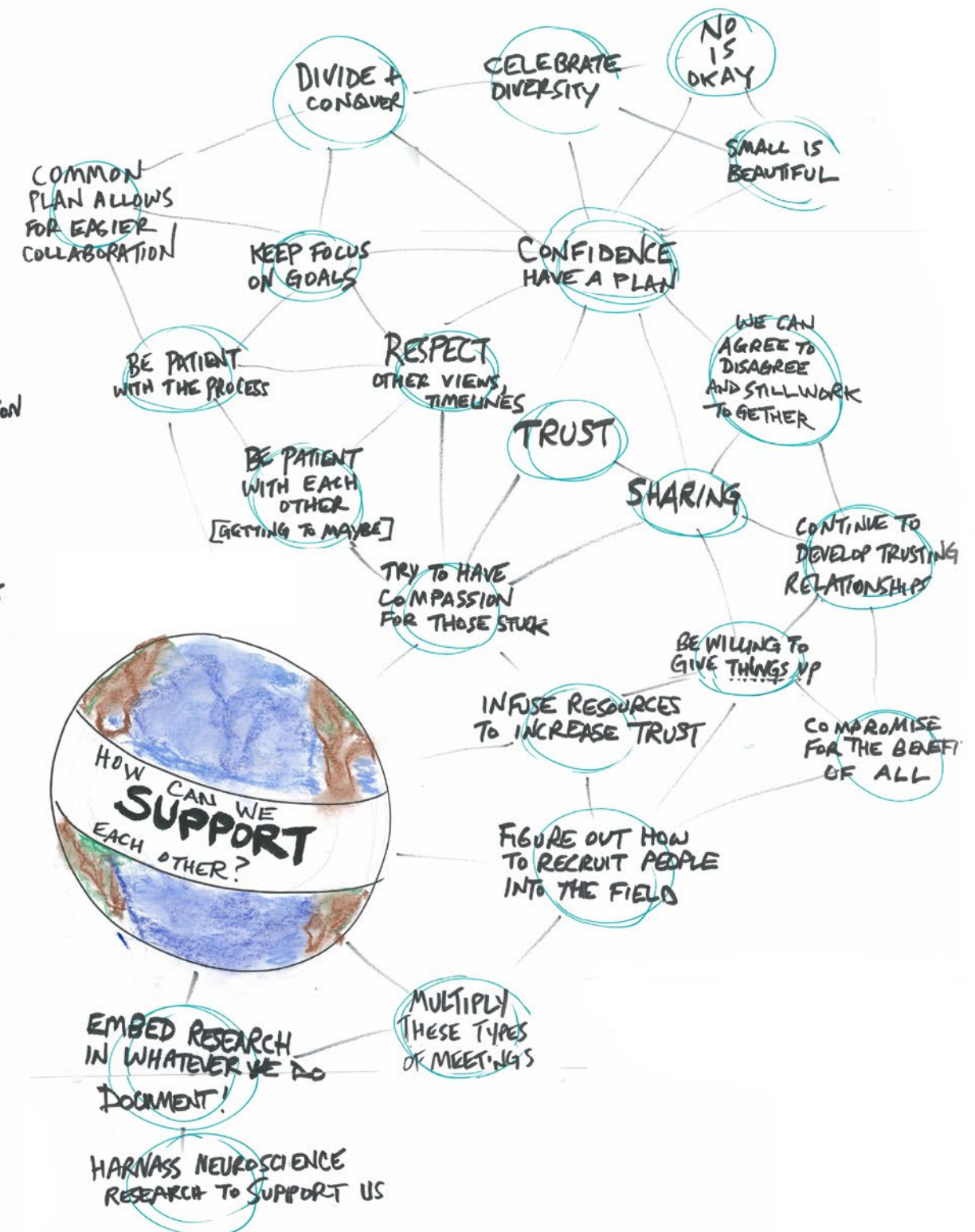
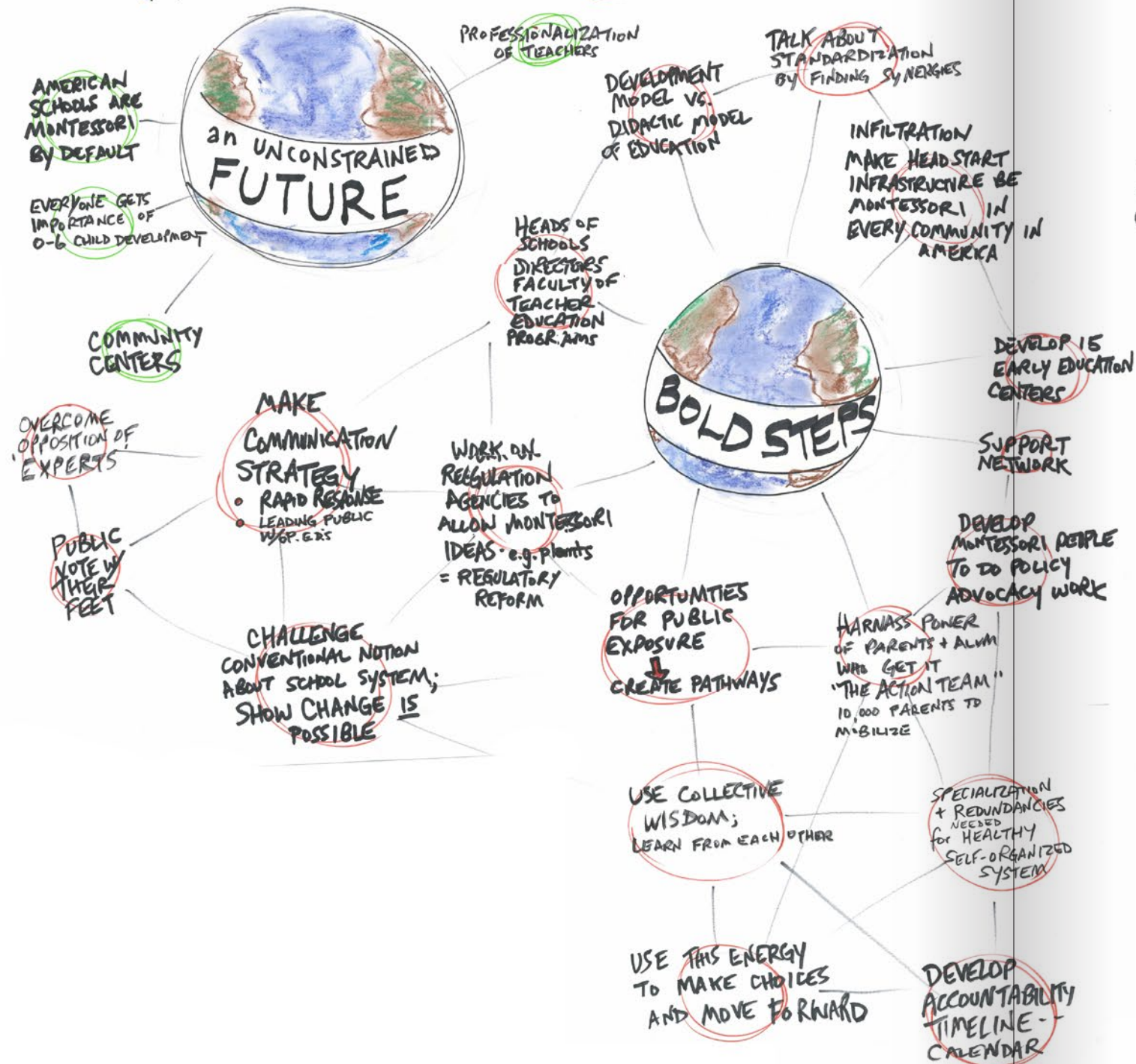
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MONTESSORI LEADERS COLLABORATIVE VISION CAFE

Facilitated by
MICHAEL RANDEL

WESTIN GEORGETOWN 9/15-16/2012





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"Dear MLC, Thank you for your hard work. It was clear in Portland your commitment and passion. I am a credentialed 3-6 Montessorian with six years experience in the classroom, the 2013-14 school year will be my second year as a lead teacher. I welcome the opportunity to grow in a community of elders that models collaboration and peace. Your united strength and experience pave the way for continued education, support and encouragement to the next generation of educators."

– Montessori Educator,
Jacksonville Beach, FL
August, 2013



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