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LEADING FOR INCLUSION IN MONTESSORI EARLY CHILDHOOD EDUCATION

HOW SCHOOL LEADERS FOSTER TEACHER AGENCY TO SUPPORT DIVERSE LEARNERS: A CRITICAL INTEGRATIVE REVIEW AND CONCEPTUAL FRAMEWORK

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Abstract

Inclusive early childhood education requires more than the physical placement of children with different abilities, languages, cultures, and developmental profiles in one classroom. It requires equitable participation, belonging, meaningful learning, and responsive support. Montessori education offers potentially enabling conditions through observation, mixed-age communities, individualized presentations, hands-on materials, freedom within limits, and respect for each child's developmental trajectory. Nevertheless, Montessori philosophy does not make a setting automatically inclusive. Inclusion depends on how leaders interpret Montessori principles, allocate resources, enable professional learning, build collaboration, and authorize teachers to adapt environments and practices. This critical integrative review examines the relationship among Montessori school leadership, ecological teacher agency, and inclusive early childhood practice. It synthesizes foundational and contemporary scholarship on inclusive education, Montessori pedagogy, early childhood leadership, and teacher agency. The review identifies five interdependent leadership conditions: an explicit rights-based vision of inclusion; relational trust and psychologically safe dialogue; sustained, practice-embedded professional learning; guided professional autonomy; and coordinated partnerships with families and specialists. It also identifies recurrent tensions concerning fidelity and adaptation, independence and interdependence, individualization and belonging, and professional autonomy and accountability. A contextual model is proposed in which leadership shapes cultural, structural, relational, and material conditions; these conditions enable or constrain teachers' individual and collective agency; and teacher agency influences children's access, participation, belonging, and learning. The paper argues that inclusive Montessori leadership is neither managerial control nor unrestricted teacher freedom. It is the ethical and organizational work of creating conditions in which educators can exercise informed, collaborative, and accountable judgment for every child.

1. Introduction

The early years establish important foundations for children's learning, identity, participation, and relationships. Early childhood settings therefore have an ethical responsibility to welcome learner variability rather than treat difference as an exception. Internationally, inclusion is understood increasingly as a process

of identifying and removing barriers to presence, participation, belonging, and achievement, not merely placing children with disabilities in mainstream settings (Ainscow, 2020; UNESCO, 2020). This broader view encompasses disability, language, culture, socioeconomic circumstance, gender, migration, family structure, and other dimensions through which children may experience privilege or exclusion.

The Montessori approach appears compatible with this purpose. Its prepared environment, carefully sequenced materials, mixed-age community, individual and small-group presentations, sustained observation, and freedom within developmentally appropriate limits can create multiple entry points into learning (Lillard, 2017; Montessori, 1912/1964). Montessori educators are expected to observe closely, follow the child, and adjust the environment in response to readiness and interest. These features may support access and participation, particularly when educators understand difference as ordinary human variation rather than as deficiency.

Compatibility, however, must not be confused with inevitability. A Montessori classroom can reproduce exclusion when materials or spaces are inaccessible, independence is interpreted rigidly, adult support is withheld in the name of self-direction, or fidelity to customary practice is prioritized over a child's participation. Research indicates both potential and difficulty. Directors of United States Montessori programs reported the inclusion of children with disabilities, but also a continuing need for professional development and specialist support (Long et al., 2022). Research with Montessori educators has likewise documented tensions around adapting materials and practices while preserving Montessori identity (Danner & Fowler, 2015; Somma et al., 2023). Recent policy-oriented analysis argues that Montessori's inclusive potential depends on culturally responsive adaptation, educator preparation, and attention to structural inequality (de Souza, 2025).

These tensions direct attention from philosophy alone to leadership. Teachers make the immediate pedagogical decisions that shape a child's daily experience, but those decisions are situated within organizational cultures, schedules, staffing arrangements, policies, resource constraints, and relationships. Leadership influences whether educators can raise concerns, learn from mistakes, collaborate with families and specialists, and make principled adaptations. The central issue is therefore not simply whether Montessori can be inclusive, but how school leaders create conditions in which teachers can act inclusively while remaining thoughtful Montessori practitioners.

2. Purpose and Guiding Questions

This paper critically integrates scholarship from four overlapping fields: inclusive education, Montessori education, early childhood leadership, and teacher agency. Its purpose is to clarify how Montessori school leaders may enable teachers to respond to learner diversity without presenting Montessori pedagogy as inherently inclusive or treating agency as unrestricted autonomy. The paper addresses three questions:

1. How do Montessori principles create possibilities and tensions for inclusive early childhood education?
2. Which leadership conditions enable or constrain teachers' agency for inclusive practice?
3. How can Montessori school leaders support principled adaptation, collaboration, and accountability for children's participation and belonging?

3. Review Approach and Scope

The paper uses a critical integrative review approach. Integrative reviews are appropriate when a problem spans conceptual traditions and diverse forms of evidence, and when the aim is theory development rather than estimation of a single effect. The analysis draws on seminal and contemporary peer-reviewed scholarship and authoritative international reports concerning inclusive education, Montessori pedagogy, early childhood and distributed leadership, professional learning, and ecological teacher agency. Sources were selected for direct relevance to the intersection of leadership, professional action, Montessori practice, disability, and

learner diversity. Reference chaining was used to connect foundational concepts with newer empirical work.

The review is interpretive rather than systematic. It does not claim exhaustive database coverage, formal quality scoring, or meta-analysis. Findings reported below are therefore conceptual themes generated through comparative reading, not results from interviews conducted by the author. This distinction is important: no participants, classroom observations, or institutional documents formed part of the present paper. The contribution lies in bringing previously separated bodies of literature into a coherent framework and specifying propositions that can guide future empirical research.

4. Inclusion in Early Childhood Education

4.1 From placement to participation and belonging

Inclusion is often weakened when it is reduced to location. A child may be physically present in a classroom while remaining socially isolated, unable to access materials, excluded from peer activity, or expected to conform to routines designed without their needs in mind. Rights-based inclusion asks whether the environment expands every child's opportunities to participate, communicate, exercise choice, build relationships, and experience competence (Booth & Ainscow, 2011; UNESCO, 2020). The focus consequently shifts from locating a problem within the child to examining barriers created by curricula, adult expectations, physical arrangements, communication practices, assessment systems, and institutional policy.

This shift does not deny that some children need intensive, specialist, or individualized support. Rather, it resists the assumption that difference justifies exclusion. Support should be organized, wherever possible, to strengthen participation in the community. A child may need an adapted grip, alternative communication, visual scheduling, co-regulation, additional repetition, a quieter workspace, or specialist consultation. These supports become inclusive when they enable membership and engagement instead of separating the child as a permanent outsider.

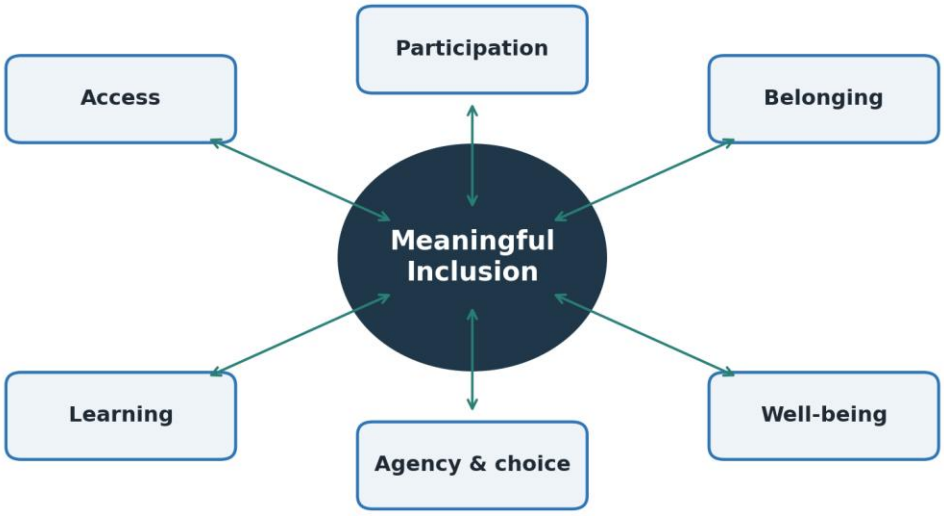


Figure 1. Interrelated dimensions of meaningful inclusion in early childhood education

Note. *Conceptual synthesis based on Booth and Ainscow (2011), Ainscow (2020), and UNESCO (2020). The dimensions are reciprocal rather than sequential.*

4.2 An intersectional and non-deficit orientation

Learner diversity is multidimensional. Disability may interact with language, poverty, gender, race, culture, displacement, and access to diagnosis or health services. Leadership that concentrates only on formal disability labels may overlook children whose participation is constrained but whose needs are unrecognized. An inclusive culture therefore uses respectful language, presumes competence, seeks children's and families' knowledge, and examines how institutional norms advantage some forms of communication, movement, behaviour, and family participation over others (Biklen & Burke, 2006; Miller et al., 2020).

5. Montessori Pedagogy: Inclusive Possibilities and Necessary Critique

5.1 Pedagogical affordances

Montessori education offers several affordances for inclusion. Observation can support responsive planning when it is systematic and interpreted cautiously. Individual and small-group presentations allow educators to vary pace and repetition. Concrete, self-correcting materials can make abstract relationships perceptible and provide feedback without constant adult judgment. Mixed-age communities can create opportunities for peer modelling, contribution, and continuity. Choice can support motivation and dignity, while uninterrupted work periods may allow children to sustain concentration. The prepared environment can reduce unnecessary adult dependence by making materials visible, orderly, and reachable.

These features are best understood as possibilities rather than guarantees. The term 'individualization' should not imply solitary learning or isolation. Montessori classrooms are communities in which children work alone, beside peers, collaboratively, and in small groups. Likewise, the guide's observational role is active and professionally demanding: the educator prepares the environment, offers precise presentations, monitors engagement, connects children with activities and peers, and intervenes when safety, dignity, participation, or development requires support.

5.2 Four productive tensions

First, fidelity and adaptation can be positioned falsely as opposites. Fidelity is valuable when it protects coherent principles such as respect, purposeful activity, careful observation, and an ordered environment. It becomes exclusionary when routines or materials are treated as untouchable despite a demonstrable barrier. Principled adaptation asks which underlying developmental purpose should be preserved and which feature may be modified so that the child can participate.

Second, independence must be balanced with interdependence. Independence in Montessori education means increasing purposeful participation and agency, not the absence of help. Human development is relational. Some children use assistance, mobility supports, communication partners, or co-regulation to exercise agency. Support that expands choice and participation is consistent with dignity; support that unnecessarily replaces the child's action is not.

Third, individualization must remain connected to belonging. A highly individualized program can still isolate a child socially. Leaders and guides must attend to peer relationships, communal routines, shared projects, and the child's recognized contribution to the group. Fourth, teacher autonomy must be linked with evidence, reflection, and accountability. Agency is not permission to improvise without knowledge. Inclusive judgment requires professional competence, collaboration, documentation, and attention to the child's and family's perspectives.

6. Teacher Agency as an Ecological Achievement

Teacher agency is frequently described as the capacity to make choices or initiate change. The ecological account is more precise: agency is achieved through the interaction of teachers' professional histories and beliefs, their orientation toward possible futures, and their practical evaluation of present cultural, structural, and material conditions (Priestley et al., 2015).

Agency is therefore neither a stable personality trait nor a gift that a leader simply hands to a teacher. It is an accomplishment made more or less possible by context.

For inclusive education, agency becomes visible in purposeful action: redesigning access to an activity, questioning a deficit assumption, coordinating with a family or specialist, advocating for resources, documenting a child's participation, or creating a new collaborative routine. Miller et al. (2020) found that scholarship on agency for inclusion emphasized instructional strategies, collaboration, and family-school-community connections. These actions are often collective. A single teacher may initiate change, but sustainable inclusion usually requires coordinated work across the classroom, school, family, and support system.

Agency can also be constrained. Rigid accountability, inadequate staffing, scarce specialist support, fear of criticism, excessive workload, conflicting policies, and narrow interpretations of Montessori fidelity can reduce the range of actions a teacher perceives as possible. Conversely, trust alone is insufficient when educators lack knowledge or material support. An affirming leader who provides no time, training, or access to expertise may unintentionally individualize systemic failure by expecting teachers to 'be creative' under impossible conditions.

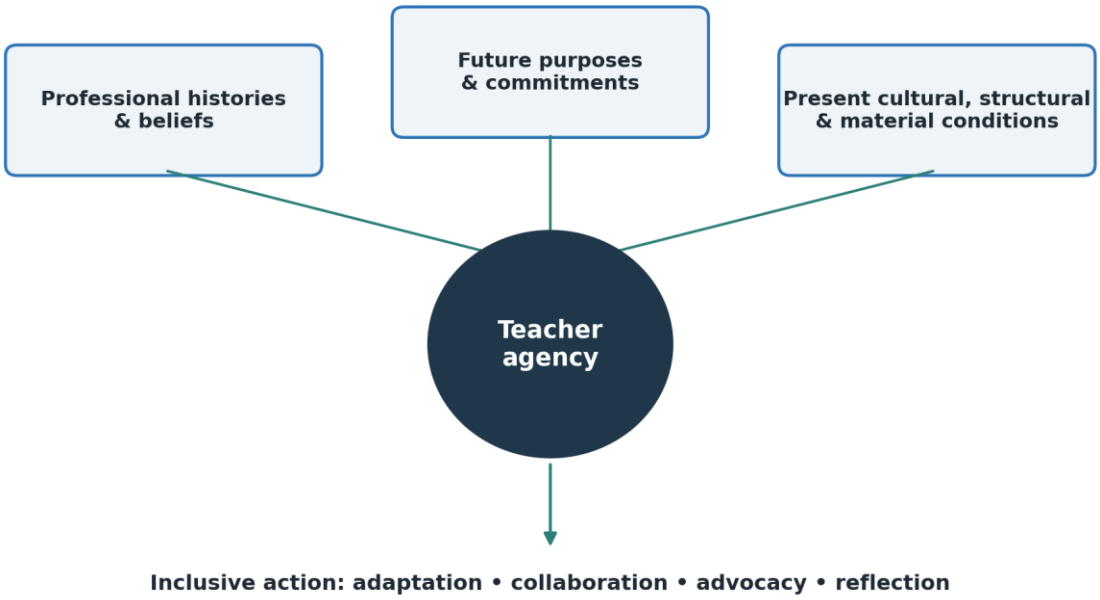


Figure 2. Ecological achievement of teacher agency for inclusive practice

Note. *Adapted conceptually from Priestley, Biesta, and Robinson (2015) and extended to inclusive practice using Miller et al. (2020).*

7. Leadership Conditions for Inclusive Montessori Practice

7.1 An explicit, rights-based vision

Leaders must define inclusion in operational terms: access, participation, belonging, learning, and equitable support. A general statement that 'every child is unique' is not enough. Admission, transition, behaviour, assessment, family communication, staffing, and referral policies should be examined for barriers. Leaders should communicate that adaptation is a professional responsibility when a routine prevents meaningful participation, while also ensuring

that decisions remain developmentally informed and consistent with the dignity of all children.

7.2 Relational trust and psychologically safe dialogue

Inclusive practice involves uncertainty. Teachers need to admit when a strategy is not working, ask for help, discuss bias, and reconsider established practice. Leaders build this capacity when observation and feedback are developmental rather than punitive, disagreement can be voiced respectfully, and problems are framed as shared inquiries. Ryan's (2006) conception of inclusive leadership emphasizes participation and the removal of exclusionary processes; distributed-leadership scholarship likewise shows that leadership activity is produced through relationships and practice, not located only in a formal role (Heikka & Hujala, 2013; Spillane, 2006).

7.3 Sustained, practice-embedded professional learning

One-off workshops rarely change complex practice. Effective professional learning is content-focused, collaborative, connected to daily work, supported by modelling and feedback, and sustained over time (Darling-Hammond et al., 2017). Montessori inclusion requires integrated expertise: Montessori developmental principles, disability and neurodiversity, observation, accessible environments, communication support, behaviour as communication, culturally responsive partnership, and collaborative problem-solving. Long et al. (2022) found that Montessori program leaders wanted continued development and specialist support, while Somma et al. (2023) demonstrated the value of extended professional learning focused on educators' beliefs and practices.

Leaders can organize cycles in which teachers identify a participation barrier, collect focused observations, consult the child and family where appropriate, design an adaptation, implement it, and review its consequences. Such inquiry respects Montessori observation while preventing observation from becoming passive waiting. Specialist knowledge should strengthen, not replace, the guide-family relationship.

7.4 Guided autonomy and shared decision-making

The productive alternative to both micromanagement and abandonment is guided autonomy. Leaders clarify ethical boundaries and common purposes, invite teachers into decisions, provide relevant evidence and expertise, and expect reflective justification. Teachers retain room to respond to the child before them, but adaptations are documented and reviewed. Shared decision-making increases ownership and draws on the situated knowledge of those working closest to children; it also creates collective responsibility so that one educator does not carry inclusion alone.

7.5 Time, resources, staffing, and accessible environments

Leadership is material as well as relational. Inclusion requires time for observation, team discussion, family meetings, planning, and professional learning. It may require classroom assistance, adapted furniture, communication tools, sensory supports, or consultation. Leaders must distinguish between an educator's unwillingness to adapt and a system that has made adaptation practically impossible. Resource constraints are real, particularly in low-resource contexts, but they should be named transparently rather than converted into judgments about a child's suitability for Montessori education.

7.6 Partnerships with families, children, and specialists

Families hold knowledge about children's communication, interests, routines, culture, health, and previous experiences. Inclusive leaders establish reciprocal communication in which families are contributors, not merely recipients of professional decisions. Children should also be listened to through developmentally appropriate verbal and non-verbal means. Partnerships with therapists, psychologists, special educators, and health professionals are most useful when goals are

translated into meaningful participation within everyday classroom life.



Figure 3. Leadership conditions that foster teacher agency in Montessori settings

Note. *Author-developed conceptual synthesis. Leadership conditions operate together; no single condition is sufficient for sustainable inclusion.*

8. A Contextual Framework for Inclusive Montessori Leadership

The synthesis supports a five-part framework. First, leaders articulate an ethical commitment to inclusion and translate it into policy. Second, they shape enabling conditions: trust, time, knowledge, staffing, resources, collaboration, and permission for principled adaptation. Third, educators draw on these conditions, their professional histories, and their knowledge of children to achieve individual and collective agency. Fourth, agentic practice appears through accessible environment design, differentiated presentations, peer participation, family partnership, advocacy, and reflective problem-solving. Fifth, the quality of inclusion is evaluated through children's access, engagement, belonging, agency, learning, and well-being—not through compliance with routines alone.

The relationships are reciprocal. Children's responses generate new information; teacher action may expose a policy barrier; family knowledge may reshape interpretation; and successful adaptations can alter organizational expectations. Leadership therefore functions as an ongoing process of inquiry and redistribution of capacity. The framework predicts that professional development will have limited impact where teachers lack time or permission to act, and that autonomy will have limited impact where knowledge, collaboration, or resources are absent.

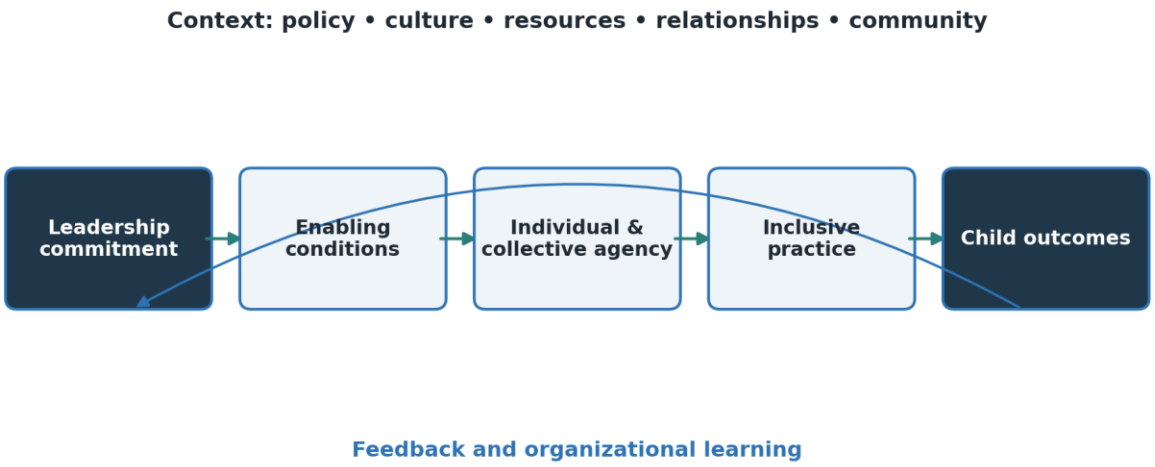


Figure 4. Contextual framework for inclusive Montessori leadership

Note. *Author-developed framework derived from the literature reviewed. Arrows indicate enabling relationships and a feedback loop, not empirically tested causal effects.*

9. Implications for Practice

9.1 For Montessori school leaders

Leaders should conduct regular inclusion reviews of enrolment, physical access, participation, family communication, transitions, exclusions, and staff learning. They should ask whose participation is difficult, which organizational condition contributes to the difficulty, and what change is within the school's control. Professional-learning plans should connect Montessori practice with disability-informed and culturally responsive pedagogy. Leaders should also establish a transparent process for requesting adaptations and specialist consultation so that support does not depend on a teacher's confidence or a family's ability to advocate.

9.2 For Montessori educators

Educators should use observation to examine participation rather than to catalogue deficits. Useful questions include: What is the child trying to communicate or accomplish? Which feature of the environment enables or obstructs engagement? What support increases agency? How does the adaptation affect access to peers and purposeful activity? Teachers should document hypotheses, invite family knowledge, test changes, and revisit conclusions. Respect for the child includes the humility to change one's interpretation.

9.3 For teacher education and accreditation

Montessori preparation should address inclusive education as a core dimension of pedagogy, not an optional specialist topic. Programs should examine ableism, developmental variability, universal and individualized supports, accessible materials, collaborative practice, family partnership, and ethical adaptation. Accreditation and quality-assurance processes should assess whether schools create meaningful access and participation, rather than considering philosophical statements sufficient evidence of inclusion.

9.4 For policy and resource-constrained settings

Policy should avoid transferring responsibility for inclusion to individual teachers without corresponding investment. Networks of schools may share specialists, develop peer-coaching structures, and create locally available adaptations. De Souza's (2025) analysis is particularly important in showing that Montessori must be adapted to community realities and disentangled from an elite institutional image. Low-cost or locally made materials can expand access, but local adaptation should not become an excuse for denying essential services or accessibility.

10. Ethical Considerations, Voice, and Representation

This article analyses published literature and did not involve human participants; institutional research-ethics approval and participant consent were therefore not required. Ethical responsibility nevertheless remains. The review avoids presenting disability as an individual tragedy or using euphemisms such as 'differently abled.' It uses person-first language while recognizing that some communities, including many autistic and Deaf people, may prefer identity-first language. Future empirical studies should ask participants about preferred terminology.

Research on Montessori inclusion should represent the perspectives of educators, leaders, families, and, importantly, children. Adult accounts cannot be treated as complete proxies for children's experience. Researchers should use accessible, developmentally appropriate methods to attend to children's verbal, behavioural, visual, and embodied expressions without claiming certainty about meaning. They should also address power differences between school leaders and teachers, ensure that participation is voluntary, protect institutional identities, and report negative or contradictory cases rather than selecting only accounts that affirm Montessori philosophy.

The author approaches the topic from a professional commitment to Montessori early childhood education and inclusive practice. This insider orientation offers pedagogical knowledge but can also create a tendency to interpret Montessori principles favourably. The critical stance adopted here therefore distinguishes philosophical potential from demonstrated practice and gives particular attention to evidence of barriers, tensions, and necessary adaptation.

11. Limitations and Directions for Research

The review is integrative and conceptual rather than systematic. It does not provide an exhaustive map of all languages, regions, Montessori traditions, or forms of early childhood provision. The small empirical literature directly connecting Montessori leadership, disability, and teacher agency limits causal conclusions. Much available evidence comes from Western and comparatively well-resourced settings. Concepts such as leadership, guide, directress, director, fidelity, and inclusion also vary across Montessori organizations and national systems.

Future research should use clearly bounded qualitative multiple-case studies to examine how inclusion is enacted across contrasting Montessori settings. Studies should report school context, participants, Montessori credentials, recruitment, data-generation procedures, researcher positionality, ethics, analytic decisions, and disconfirming evidence. Interviews should be combined, where feasible, with observations, documents, family perspectives, and children's expressions. Longitudinal research could examine how leadership conditions and teacher agency change during professional-learning and school-improvement initiatives. Comparative work is needed in low- and middle-income contexts, where material constraints, cultural expectations, private provision, and limited specialist services may shape both inclusion and Montessori identity.

12. Conclusion

Montessori education contains important resources for inclusion, but no pedagogy is inclusive by declaration. Observation, individualized presentations, mixed-age community, hands-on materials, and freedom within limits can expand participation only when

leaders and educators interpret them responsively. Rigid fidelity, inaccessible environments, unsupported expectations of independence, and insufficient professional knowledge can convert promising principles into barriers.

Inclusive Montessori leadership is the deliberate creation of cultural, relational, structural, and material conditions in which teachers can achieve informed and collective agency. It combines a rights-based vision, relational trust, sustained professional learning, guided autonomy, shared responsibility, family partnership, specialist collaboration, and resource advocacy. Its ultimate test is not whether adults believe they have preserved Montessori practice, but whether every child experiences meaningful access, participation, belonging, dignity, learning, and the opportunity to contribute to the community.

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