Spring 2017

Addressing Underrepresentation in Gifted Education: A Historical Case Study of Policy and Practice in One School District

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http://doi.org/10.21220/W4936F

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ADDRESSING UNDERREPRESENTATION IN GIFTED EDUCATION:  
A HISTORICAL CASE STUDY OF POLICY AND PRACTICE  
IN ONE SCHOOL DISTRICT

A Dissertation  
Presented to  
The Faculty and Staff of the School of Education  
College of William & Mary

In Partial Fulfillment  
of the Requirements for the Degree  
Doctor of Philosophy

by  
Darlene Wiggins Dockery  
March 2017
ADDRESSING UNDERREPRESENTATION IN GIFTED EDUCATION:
A HISTORICAL CASE STUDY OF POLICY AND PRACTICE
IN ONE SCHOOL DISTRICT

This Dissertation is submitted in partial fulfillment of
the requirements for the degree of

Doctor of Philosophy

Darlene Denise Wiggins Dockery

Approved by the Committee, May 2017

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DEDICATION

I dedicate this book to my parents, Rev. Booker T. Wiggins, Sr. and Minister Mary Chapman Wiggins. At Mom’s recent birthday celebration, Della said, “My parents constantly kept a vision of better, greater and ‘one day’ in us.” As an adult, I have come to realize how incredible the trajectory of our family has been due to your faith and your thrift. Working minimum wage jobs, you built a brand new house and moved your five children from the projects. GED graduates, you assured us we were going to college. I went through the world believing that I was going to college because of your confidence that we would, completely oblivious to the economic realities that could be a barrier...and so, go to college, we have. Della as a Reynolds Scholar, and with a master’s degree; Tess as a NC Teaching fellow; Junior with a Bachelor’s in Business Administration; Chris with a Master’s from Duke in Nursing; and I here, today, about to become the first woman on either side of our family with a Ph.D. This honor is yours.

I also dedicate this book to my siblings: Ben, Della, Tessie, Jr. & Chris, my life is richer because of you. Della and Tess, thank you for setting the pole high as two of my first role models and for your practical support, and wise words through this journey. Jr & Chris you don’t know how many good choices your presence in my life helped me to make as I tried to be the role models for you that Della and Tessie were for me. As men, you have become my role models of perseverance and accomplishment. I love you big little brothers. And then each of you went and gave me more siblings to love...Anthony, Priscilla, Bob, Dee, thank you for your love and encouragement. I’m glad they picked you. I love you all
My dear Aunt Dorcas Rebecca, a teacher’s teacher. Whether in general education or AP biology classes, or professional development workshops for teachers, or writing model lesson plans or contributing to textbooks, you use all your gifts to equip students to experience success. Thank you for being such an amazing role model.

In loving memory of my dear, sweet friend, Veronica Harris Wooten.

An advocate for her students. Called to Teach.
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ACKNOWLEDGEMENTS

At the Democratic National Convention, Senator Cory Booker of New Jersey stated, “There’s an African saying, ‘If you want to go fast, go alone. If you want to go far, go together.’”

Admittedly, I have some reservations when a statement is pronounced to be an “African proverb,” with no reference to the country or people who are supposed to have originated it. (I have been working on becoming a researcher, after all.) The sentiment of the saying, however, is so true for my experience with this study. To accomplish this goal, I needed those willing to go far with me, and was fortunate to have so many important people join my journey. First, thank you to Dr. Mary Futrell who validated my desire to serve “at-risk gifted students” by giving me a copy of The Achievement Trap and referring me to a leader in the field. Thank you to my William and Mary professors. Each of you gave me one more piece of the puzzle that would become my study by providing another lens by which to view educational leadership and scholarship. To the professionals who allowed me a window into their passion for and experiences serving students, I thank you for participating in my study; but most of all, I thank you for making the world a better place every day with the work you do.

To the members of my committee: You did not have to say, “yes” when I asked you to be on my committee, but each of you did. You not only encouraged me, but each gave your strengths and expertise to support my growth as a researcher, and I am so very grateful. Your support throughout this process in ways big and small leaves me humbled.
Dr. Griffin, you poured your expertise as a qualitative researcher into my efforts, but more than that, your assurances that my dream was attainable, and the work I hoped to do necessary, lent inspiration that stared down burnout. Dr. Kim, your model of attention to the task at hand was so important to my efforts. Your quiet inquiry when I bumped into you on the elevator, “Are you writing?” was a spur when I needed one. Dr. Jennifer Cross, my first professor at William and Mary, you have encouraged me from my very first day that dreams worth having are ones that require persistence even when mothering the dreams of others. Your notes, questions, attention to detail and insistence on clarity pushed me to work toward becoming a more precise writer. Finally, to my committee chairperson, Dr. Tracy Cross, there are those we think of as quiet giants. It was in your classes that I began to understand what it means to be a scholar. You wear all that you have accomplished both as a scholar, a practitioner and a leader in the field of gifted education with such humility. Your commitment to and model of serving gifted students from all socio-economic backgrounds, both as a researcher and as one committed to creating opportunities for them to develop their talent -- and allowing me to be a part of it -- was such a validation of my own passion and dreams. Each of you moved me forward.

Thank you all.

Thank you, also, to my supportive extended family, pastors and church families for practical and moral support along the way. Your inspiration and prayers helped me to keep moving forward. I give honor and a heart full of gratitude to God for this moment. I also would like to thank my writing partner, Felecia Highland for meeting me at 6:00 am all of those Saturday mornings and often staying until dark. The processing and fine tuning was intellectually stimulating, yes, but the laugh breaks so necessary! I especially
want to thank Sharon and Chris Kubick. You were Claudia and my family away from home. Knowing that when I could not be with her, she was safe and happy made it possible for me to work with a free mind. To the beautiful, ageless women formerly known as “The Party Patrol,” thank you for being my life’s cheerleaders. Sisters by choice.

Finally, I am grateful to Claudia Ellyse-Darlene Dockery, my sunshine, for taking this journey with me. Many times, as a divorced, single mother miles from extended family, I would wonder why I thought I could do this...and then I’d look at you. You make me want to be my very best self. Being your mother gave me a lion’s roar when I thought I’d lost my voice. You were the impetus for my beginning this journey, and my determination to complete it. I wanted to be someone you could look up to, but who you have become, from the young teen you were when I began this journey, to the young woman you are now, makes me look up to you. I hope I’ve made you proud because you make me proud every single day.
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Abstract

Researchers exploring various issues in gifted education identify a common finding. Students’ socioeconomic status and race impact what populations are typically underrepresented in gifted education programs. The purpose of this historical case study, with incorporated elements from policy historiography, was to examine policy and practice in one school district making efforts to alleviate underrepresentation of African American, Native American, Latino and/or low-income students in its gifted education program. These methodologies were used to examine the social construction of the reality of reform in the policy and practice of the gifted education program in the district.

The results of this study suggest that the story of the Academic Potential Project, gathered through document review and participant interviews, is one of effective policy reform in a local district’s gifted education program. From the social construction of the need for policy reform to its formulation and implementation, careful data analysis, clear policy goals and policy instruments led to the development of a research-based model with a research-based curriculum framework and instructional pedagogy. The findings suggest gifted education has great potential to be a means by which low-income, high ability students become a part of the college pipeline. Educational policy that addresses the problems specific to this group of learners obtaining college readiness, is critical at every level of the policy scale: national, state and local. Results of the study will inform research in college access and equity, education policy, pre-service teacher training and professional development in meeting the needs of underrepresented gifted students.
ADDRESSING UNDERREPRESENTATION IN GIFTED EDUCATION:
A HISTORICAL CASE STUDY OF POLICY AND PRACTICE
IN ONE SCHOOL DISTRICT
CHAPTER 1

INTRODUCTION

One of the goals of the Obama administration was that by the year 2020, the United States would lead the world in college graduates (Obama White House Archives, 2011). There was much debate as to the best way to go about achieving the President’s lofty goal. One strategy the administration hoped would be effective in getting low-income students to attend college was the enlisting of the first lady to share the story of her own journey from the low-income Southside Chicago neighborhood of her youth to the halls of elite universities (Thompson & Goldfarb, 2014). Michelle Obama, an African American woman, was a student in a public school gifted education program. She skipped second grade, graduated from a magnet high school as salutatorian and attended Princeton and Harvard Universities, among the most selective universities in the United States (Bond, 2012; Obama, 2014; Ross, 2008). Although with the most recent election, the administration has changed, through their nonprofit organizations, President and Mrs. Obama maintain a commitment to encouraging higher education for first generation college students. As consideration is given to addressing those issues related to college access, targeting students typically underrepresented in gifted education programs may be
an important first step.

**Significance of the Problem**

Among top performers at every level of the K-16 educational system in the United States, there is a marked underrepresentation of students who are African American, Native American, and Latino (Ford & Whiting, 2007; L. Miller, 2004; Olszewski-Kubilius & Clarenbach, 2012). As in society in general, a disproportionate number of these students are from low-income families (L. Miller, 2004; Plucker, Burroughs, & Song, 2010). Researchers exploring various issues in gifted education including teachers’ professional development, identification, and academic experiences of specific student populations identify a common finding. Students’ socioeconomic status and race impact what populations are typically underrepresented in gifted education programs. Based on most traditional measures of academic ability, however, the number of low-income high-ability students in the United States is estimated to exceed the individual populations of 21 states (Barlow & Dunbar, 2010; Bernal, 2002; McIntosh, 1995; Wyner, Bridgeland, & DiJulio, 2007; Yoon & Gentry, 2009).

Racial and income disparities affect achievement even among high ability students (Ferguson, Ludwig, & Rich, 2001; Olszewski-Kubilius & Clarenbach, 2012; Plucker et al., 2010). There is a measurable achievement gap between high ability students who are low income and cultural minorities and their more affluent White peers (Wyner et al., 2007; Olszewski-Kubilius & Clarenbach, 2014). Several factors impact this achievement gap, from issues regarding student identification for participation to teacher preparation and expectations to curriculum offerings. In their study, Wyner and colleagues (2007) found that 47% of students identified as gifted are in the top quartile
for income. Nine percent are in the lowest. High poverty schools are less likely to offer advanced courses, and if they are offered, students are less likely to take them. Sixty-five percent of students in college preparatory classes are from high socio-economic status (SES) families, whereas 28% are from low SES. Further, teacher expectations are lower and curriculum selections are fewer in high poverty schools. (McIntosh, 1995; Olszewski-Kubilius & Clarenbach, 2014). Many researchers consider effective strategies for early identification for participation in gifted programs particularly important for low income and/or cultural minority children (Daugherty & White, 2008; Passow & Frasier, 1996; Tout, Halle, Daily, Albertson-Junkans, & Moodie, 2013; Yoshikawa et al., 2013).

**The Purpose of the Study**

The purpose of this historical case study, with incorporated elements from policy historiography, is to examine policy and practice in one school district making efforts to alleviate underrepresentation of African American, Native American, Latino and/or low-income students in its gifted education program. African American, Native American, and Latino students are overrepresented among the poor in the United States (L. Miller, 2004; Plucker et al., 2010). Poverty adversely impacts academic achievement and results in an income-related gap in college access and completion. Foundational to policy initiatives with the goal of increasing global competitiveness must be the addressing of those factors that are barriers to readiness for and access to higher education for low-income, high ability students (Burney & Beilke, 2008; L. Coleman, 2006; Haveman & Smeeding, 2006; Riddle, 2010). This can be accomplished through the identification and replication of program models that have been demonstrably effective in building college pipeline opportunities for high ability low-income students.
Context

The context for one such model, for the purpose of this study, will be known as the Suburban District in the Commonwealth of Virginia, one of the states that requires local school districts to identify and serve gifted students (Regulation 8VAC20-40-10). The model, to be called the Academic Potential Project for the purposes of this study, is a part of the Suburban District’s gifted education program developed with the goal of increasing the number of students participating who are from groups usually underrepresented in gifted education programs.

The Suburban District is a large school district located in the Commonwealth of Virginia. Materials retrieved from the district’s website revealed that during the 2015–2016 academic year, the district served over 185,000 students, and is very diverse. Represented in its population are 10.3% African American; 0.2% American Indian; 19.5% Asian American; 23.6% Hispanic; 4.9% Multiracial; and 41.4% White students. There are over 50,000 students receiving free and reduced-price meals. Both English for Speakers of Other Languages (ESOL) and Special Education programs provide services for nearly 30,000 students each. Beginning with the youngest learners, the goal of the Suburban District’s Academic Potential Project is to identify giftedness in diverse students as early as possible, and to support their development so that they are equipped for increasingly greater academic challenges. Modeled on other programs influenced by the work of Borland (2003) and Renzulli (1977), foundational to this model is the notion of casting a wide net to include, not exclude, in order to develop potential (Adams & Chandler, 2014; Horn, 2015; Olszewski-Kubilius & Clarenbach, 2012).
Several researchers and program evaluators have identified research-based best practices from the field of gifted education most effective in serving students with high academic ability including those underrepresented in gifted education programs (Bland, Shaklee, Kitsantas, Miller, & Mattix, 2013; Olszewski-Kubilius & Clarenbach, 2012). The Suburban District’s close alignment with the practices of exemplar models has led to national recognition of its Gifted Education Program. Prior to the beginning of the Academic Potential Project, the Suburban District was already recognized for academic rigor that made students from their district particularly competitive in the college application process. Between 1992 and 2002 the Suburban District produced a disproportionate number of applicants, admissions and enrollees in the state’s flagship university, the University of Virginia (J. K. Turner & Pusser, 2004). Referencing the zip codes represented by these students in 2002, J. K. Turner and Pusser (2004) noted, “Based on their 17-21 year-old population these zip codes were predicted to enroll a total of 73 students, but in actuality they collectively enrolled 330 students. They enrolled almost five times (4.8) more students than predicted” (pp. 401-402).

Duke (1989) explored the impact of district level policy on equity. He noted the impact of enacting policy to standardize curriculum throughout a district including addressing course fragmentation by ensuring that a basic number of classes in each discipline was offered at each school. As in the district identified in his study, the Suburban District took steps to ensure that courses were appropriately sequenced at each of their schools as well. Further, they made basic skills programs available at each school and ensured standardized criterion-referenced assessments that met standards prescribed by the Suburban District. Other documents retrieved regarding the Suburban District’s
history indicated the school board required that school psychologists be allotted more clinical time, and that art, music and physical education be taught by specialists. This change allowed for students to pursue academic courses in greater depth that were aligned with their strengths and interests.

Gándara and Bial (2001) described research suggesting partnerships between school districts and universities are beneficial in providing resources that strengthen schools to better-equip underrepresented students for access to and success in college. Another project implemented in the Suburban District targeting underrepresented students was consistent with this research. Through a collaboration between the Suburban District and the local university, students received academically rigorous instruction and exposure to college campus experiences. Thus, making the link between what happens in the Suburban District to create a college pipeline for underrepresented students is not a new proposition in this district and laid the foundation for the Academic Potential Project.

The Academic Potential Project is a loosely structured model that focuses on early identification and intervention, the implementation of which is determined by resources at particular school sites. Initially, the model was piloted in 12 Title I schools with the goal of addressing underrepresentation by identifying students from low-income and diverse backgrounds in grades K-2 in order to prepare them for participation in gifted education programming by grade 3. Currently 84 elementary and 3 middle schools employ the model. Key features of the Academic Potential Project model includes components similar to those outlined in both Horn (2015) and Renzulli (1977) such as a school-wide commitment to leadership of principals and collaboration among teachers,
non-traditional assessments, interventions, extensions and enrichment, professional development for teachers and parental involvement (see Figure 1).

Figure 1. Sample of Recommended Program Components for Serving Underrepresented Gifted Students. Adapted from “Young Scholars: A talent development model for finding and nurturing potential in underserved populations,” by C. V. Horn, 2015, Gifted Child Today, 38(1), p. 21. Copyright by Sage Publications.

Academically rigorous curriculum, principal leadership, professional development for teachers and parental involvement are central to the effectiveness of gifted programs targeting underrepresented students (Bland et al., 2013). The Academic Potential Project is just one part of the Suburban District’s Gifted Education Program that offers four levels of service for students grades K–8. While Level I services provide creative and critical thinking skills opportunities and are available to all students, the Academic Potential project offers gifted services beginning with Level II, and provides extended learning and additional challenge for students and continues through Levels III and IV. As of 2013, in the focus areas of Program and Identification, Curriculum and
Professional Development, the Suburban District’s Gifted Education program met the standard of what is required by the Virginia Department of Education regulations (Appendix A). In the areas of Curriculum and Professional Development, the district exceeded what was required. For example, all gifted education resource teachers in the Suburban District are required to enroll in a 3-credit course with a focus on culturally responsive teaching, and to learn research-based approaches that facilitate the nurturing of gifted potential in all populations. The Suburban District’s gifted program also met or exceeded most of the National Association for Gifted Children (NAGC) programming standards, including equal access and the comprehensiveness and variety of options as a part of Program Services (NAGC, n.d.; Appendix B). As indicated in Table 1, the Suburban District’s Academic Potential Project has resulted in a significant increase in the number of underrepresented students receiving Level IV services since its inception in 2001 (see Table 1).

**Conceptual Framework**

**Social Construction**

The conceptual framework underpinning this study is social construction theory. Berger and Luckmann (1966), in their theory of social construction, argued that acts of interpretation are central to the creation of the construction of social reality: “Social order is a human product, or more precisely, an ongoing human production” (p. 69). Central to this concept is the idea that people constantly shape and create their own social worlds as they interact with others and are not merely acted upon by social forces. Also important to the concept is the notion that people act according to the meanings used to interpret a situation (Nedlund, 2012; Schneider & Ingram, 1993; Segal, Segal, & Eyre, 1992).
Applying Berger and Luckmann’s (1966) theory to policy development, Schneider and Ingram (1993) argued that policy agendas, policy tools and the rationales for policy choices are influenced by social constructions, the shared understandings and implicit agreements of a group (Boghassian, 2001). As a result, political orientation and participation are motivated by messages people receive that are entrenched in the constructions. Policymakers use these constructions to build a political base. Nedlund (2012) asserted:

What Schneider and Ingram’s model highlights is the location of the policies in society. Policies influence citizens (both in an instrumental and a symbolic way) and produce policy experiences, which in the future influence their behavior, values, and participation. A policy has underlying patterns and logics that reflect certain values and interests, which are not only dominant in existing power relationships, but also in both the social construction of knowledge and the social construction of groups of people. (p. 55)

In this study, events and circumstances that impacted changes in the Suburban District’s gifted education program from the point of view of administrators and teachers involved in the policy implementation process over time are recounted. Historiography allows researchers to examine the context by which historical evidence is generated. Thus, policy historiography exemplifies this application of social construction theory to policy development in that it examines the foundation of change due to prevailing attitudes and principles that influence subsequent policy developments in history and current practice (Gale, 2001). The Suburban District was chosen for this study due to the characteristics of the model that related to the dissertation topic on the possibilities for education policy
to impact practice. In this case, the impact of policy was on this district’s gifted education program which lead to the development of what has been described as an exemplary and replicable model for serving students typically underrepresented in gifted education programs.

**Research Questions**

This study addresses the following two questions:

1. How, if at all, did the nature of federal, state and local policies, and their associated mandates to change practice, impact the underrepresentation of African American, Native American, Latino and/or low income students in gifted education programs within the context of one diverse school district?
2. What relationships or historical events, if any, did stakeholders perceive to be most influential on changes in policy and practice to the original gifted education mandate in Suburban District?

**Assumptions of this Study**

This study is based upon three assumptions:

1. Faculty, counselors and administrators have well thought-out perceptions regarding changes in the Gifted Education program.
2. Teachers’ and administrators’ perceptions affected their attitudes about and behaviors toward the program.
3. Their perceptions yielded insights that can be used to inform other districts seeking to address issues of underrepresentation in gifted programs.

Criteria for participation required that participants could be considered stakeholders in the policy and practice of the Suburban District Gifted Program during the period of
2001–2015 as teachers, administrators or policymakers involved in the development or implementation of the Academic Potential Project. However, should a compelling reason arise through document review or through the collection of interview data, participants may be expanded to include particular parents and/or students for semi-structured interviews. Primary methods that were used to collect data for this study were document review and semi-structured interviews.

**Definition of Terms**

Although readers will be provided with constitutive definitions of most specialized terms that are used in this document, especially those that may have multiple definitions in the literature, within the context of the chapters in this study, the following definitions of terms are presented for clarity:

1. *Achievement gap* — describes the results of various outputs between groups of students as described by the National Center for Education Statistics as occurring when:

   one group of students (such as, students grouped by race/ethnicity, gender) outperforms another group and the difference in average scores for the two groups is statistically significant (that is, larger than the margin of error).

   NCES explored the achievement gaps between Black and White, and Hispanic and White, students using NAEP data to illuminate patterns and changes in these gaps over time, and identify factors that might underlie such gaps. (National Center for Education Statistics, 2015, para. 1)

2. *Gifted* — Part of the challenge to advocacy efforts is that, even among professionals in the field of gifted education, ideas about what constitutes
giftedness vary (J. R. Cross & Cross, 2005; Sternberg & Davidson, 2005).
Because there is no federal mandate for gifted education in the US, the definitions
of who should be considered in this target population are as varied as the states
from which they emanate (M. R. Coleman & Gallagher, 1992). The Marland
(1972) conceptualization of gifted children as “those identified by professionally
qualified persons who by virtue of outstanding abilities are capable of high
performance” (p. 20) is foundational to how “gifted” is framed in most research
referred to in this study. Gifted, gifted and talented, most able and high ability are
used interchangeably in this study and may indicate both students who have been
assessed and formally identified for gifted education services and those who may
have gifted potential, but have not been formally identified.

3. *No Child Left Behind Act (NCLB)* — President George W. Bush’s signature
education reform law, Public Law 107-110 known as *No Child Left Behind Act*
(NCLB), passed in 2001 and signed into law on January 8, 2002, is the updated
version of the Elementary and Secondary Education Act (ESEA) signed by
President Lyndon B. Johnson in 1965, a year after the Civil Rights Act was
passed. The new law linked access to Title I funds to academic standards and
assessment requirements (Tanner, 2013; The Education Trust, 2004). NCLB was
recently reauthorized as the Every Student Succeeds Act (ESSA) and signed on

4. *Poverty* — Although the constructs of *low income* and *poverty* are foundational to
social science and education research, defining and measuring the constructs are
often challenging (Sirin, 2005). The U.S. Census, for example, uses the poverty
threshold developed in 1963-1964 by Mollie Orshansky, an American economist and statistician. This cash-based formula is derived by tripling what Orshansky determined to be the typical cost of food for a family of four (Fisher, 2008). For the studies included in this review, the poverty measure most often used was eligibility for free or reduced-price lunch. 

Poverty, low-income, low socioeconomic status and low SES are used interchangeably in this study.

5. **Talent Development** — The discussion of the concept of talent development has recently been within the context of a framework for the consideration of what giftedness is and how best to educate gifted children (Olszewski-Kubilius & Thomson, 2015). Olszewski-Kubilius and Thomson (2015) described talent development as a:

   "Broader conception of intelligence and ability, beyond IQ; a recognition of the role of noncognitive traits in gifted achievement; and a focus on serving a broader range of gifted students with varied program models and services, especially typically under-identified students such as socio-economically disadvantaged, promising learners." (p. 49)

The concept of talent development as used in this study builds on Olszewski-Kubilius and Thomson’s (2015) description as well as the concept derived from Gagné’s (2004) talent development theory that suggested talent development is a progressive transformation of outstanding natural abilities described as “gifts” into exemplary skills and knowledge within specific fields of endeavor or “talent.”

6. **Education Policy** — Fowler (2012) described public policy as the active and
changing process by which a government’s intentions are expressed both by patterns of action and inaction. Education policy consists of those decisions related to the education of children that are determined by elected officials primarily on the state and local level such as legislators or school board representatives as well as district and school level administrative staff (Fowler, 2012).

7. Underrepresented — When certain sub-groups of a population are represented in a particular setting at disproportionately lower rates than their relative number in the general population, they are said to be “underrepresented.” For example, the U.S. Department of Education’s Civil Rights Data Collection’s (CRDC) most recent data indicated that, although Latino and African American students represent 40% of the population in schools with gifted programming, only 26% are enrolled in those classes (United States Department of Education, 2014). Smith and Brandon (2013) found that in Virginia, the target location for the present study, data from 2011-2012 indicated that while African Americans made up 24% of the overall enrollment in the Commonwealth, only 11% were identified for participation in gifted education. Further, of the 16% of students statewide identified for participation in gifted education programs, the disparities were even more evident in specific school districts. As Smith and Brandon (2013) noted:

In Danville, for example, African Americans constitute 68% of the overall enrollment but 28% of the gifted students; in Charlottesville, they make up 40% of the overall enrollment but 10% of the gifted students. In Manassas,
Hispanic students represent 51% of the overall enrollment but 29% of the
gifted students. (para. 10)

Based on this example, during the 2011-2012 academic year, statistics indicated
that African American students were significantly underrepresented in gifted
education programs in Danville, VA, and Latino students were underrepresented
in Manassas, VA (Smith & Brandon, 2013).

**Limitations and Delimitations**

This study has both limitations and delimitations.

**Limitations**

Limitations are those aspects of a study that are beyond the researcher’s control.

One of the limitations of this study, due to the nature of narrative inquiry, is the potential bias reflected in the recollections of those interviewed. The availability and nature of document sources from the period during which the policy was being developed is an additional limitation. Biases inherent in artifacts used to document the policymaking and program implementation processes may result in the incorporation of those biases into the resulting historical narrative that is the goal of this study.

The population identified as “underrepresented” in gifted education programs in the literature referenced in this study presents another limitation. African American, Native American, Latino and low-income students’ exclusion from gifted education programs is well documented. Asian students are often described in the literature as overrepresented in gifted education programs (Doan, 2006; Ford, 1998). There are cultural and socio-economic differences within each of the aforementioned sub-groups. The presentation of Asian students as a monolithic group, however, with no distinction
between South Asian and East Asian students or among East Asian populations may impact program policy and practice significantly in specific regions of the country (Patel, 2010; Yoon & Gentry, 2009). Schmidt (2015) referenced a quote from an interview with Jennifer Lee, a University of California Sociology professor who stated:

I think the central question here is: Who are Asian-Americans? Are Asian-Americans only the hyperselected and the highly educated and those who fit this exceptional outcome, or are Asian-Americans willing to recognize the ethnic and class diversities of our communities? Here I am thinking of Asian-ethnic groups like Cambodian, Laotian, Hmong who have higher high-school-dropout rates than African Americans and Latinos. They are also Asian-Americans, and they would benefit from race-conscious admissions. (as cited in Schmidt, 2015, para. 4)

This idea of who is Asian and how to disaggregate data to determine how to best serve certain underrepresented populations of Asian students could be important when development of programmatic models designed to mitigate the impact of underrepresentation of students from minority and/or low income communities in gifted education programs is discussed. Certain subgroups of Asians, such as those from Japan, China, Korea and India, have advanced levels of educational attainment. In 2013, with 14% among Latino, and 8% among African Americans, the high school dropout rate among other subgroups of Asians, including 38% Hmong or 32% Laotian, has been greater than any other racial and ethnic groups in the United States (“Critical Issues,” 2012; Center for American Progress, 2013; Yoon & Gentry, 2009). Using U.S. Bureau of Census and U.S. Department of Labor data from 2013, for example, the Center for American Progress noted that among the 320,000 Cambodians in the US, 37% have less
than a high school diploma, compared to 14% for Asians overall and 13.4 % US average (Center for American Progress, 2015a). During the same period, of the 1.7 million Korean Americans in the US, however, only 9% have less than a high school diploma (Center for American Progress, 2015c) and of the 1.4 million Japanese Americans, only 6% (Center for American Progress, 2015b). As early as 2002, Kitano and Dijiosia (2002) argued that disaggregation of data by school districts to identify sub-groups of Asian students is key to determining who among Asian students is under or overrepresented in gifted education programs. Much of the literature on Asian students in gifted education programs does not reflect this reality.

Another limitation may be in the quality and interpretation of data itself. In the attempt to tell the story of policy and practice over time, quality and interpretation of the data may limit the explanation of the causes of the sequence of events identified as important to the policy and practice of the model that is the focus of this study. There is also the potential to exclude equally plausible alternative explanations for findings.

One of the most noted limitations of qualitative research such as the case study design in the present study is that it is not generalizable and many researchers consider it to be more vulnerable to researcher bias, which can influence how conclusions are reached as well as how evidence is reported (Creswell, 2013; Gall, Gall, & Borg, 2007; Yin, 2014). Yin (2014) stressed that following of systematic procedures when conducting the case study can address concerns regarding researcher bias. Although I anticipate using strategies such as the maintaining of a reflexive journal as a means of bracketing in order to set aside potential prejudices, another limitation is the potential for investigator bias in that my personal experiences as a high ability student from an underrepresented
population of gifted learners and first generation college student may impact analysis.

Thick description, audit trail documentation, researcher memos and member checking are other strategies that were used to limit researcher subjectivity.

**Delimitations**

Delimitations are the boundaries the researcher places around the study. This study was delimited to the singular case of one school district’s gifted education program. The research approach employed in this study was the historical case study, a qualitative research approach. Both strengths and limitations are inherent in empirical research whether quantitative or qualitative. Shields (2007) pointed out:

> The strength of qualitative approaches is that they account for and include difference—ideologically, epistemologically, methodologically—and most importantly, humanly. They do not attempt to eliminate what cannot be discounted. They do not attempt to simplify what cannot be simplified. Thus, it is precisely because case study includes paradoxes and acknowledges that there are no simple answers, that it can and should qualify as the gold standard. (p. 12)

This study was further delimited to a purposive sampling of policymakers, teachers, and administrators involved in the policy and practice of the Suburban District’s Gifted Education Program, particularly the Academic Potential Project. Although it is recognized that there are stakeholders who may have been very influential, indeed, the impetus for many of the changes leading to the creation of the Academic Potential model in the Suburban District, including business or community agency leaders, parents or even students themselves, stakeholders targeted for this study are delimited to district- and site-level administrators and teachers. However, should a compelling reason arise
through document review or through the collection of interview data, participants may be expanded to include particular parents and/or students for semi-structured interviews.
CHAPTER 2
REVIEW OF THE LITERATURE

This chapter provides an extensive review of the literature related to gifted education, public policy and the impact on the college pipeline for African American, Latino, Native American, low-income, non-native English speakers and other students typically underrepresented in gifted education programs. The aim of this literature review is to provide a framework that serves as the foundation for the present study by creating an empirical context to view the policies and practices organized around the issue of underrepresentation in gifted education by:

- documenting that the problem exists and examining possible influences through an overview of relevant studies;
- highlighting potential solutions to the problem via research findings;
- exploring the district-level policymaking process; and,
- examining the context through published studies including journal and news articles, and other documented sources of information about the present study site.

This review is divided into sections that include (1) documentation of the problem and
influences on underrepresentation (2) potential solutions to the problem of underrepresentation and (3) practical implications of school district policymaking. This chapter begins with evidence of the problem of underrepresentation and an overview of policy considerations on the federal, state and local levels that affect underrepresentation of certain groups of students. An examination of literature on recommendations that may offer solutions that can address underrepresentation in local programs follows. The procedures and implications of the policymaking process at the school district level are explored, and a rationale for this study is presented.

Factors Influencing Underrepresentation

“In brief, we must first close the opportunity gap if we are to have any hope of closing the achievement gap” (Futrell & Gomez, 2008, p. 76).

Evidence of the Problem

In the United States, from elementary to secondary to post-secondary school, African American, Native American and Latino students are underrepresented among those achieving at the highest levels (Ford & Whiting, 2008; L. Miller, 2004; Olszewski-Kubilius & Clarenbach, 2012). As is reflected in American society, many students from the aforementioned populations are from low-income families (L. Miller, 2004; Plucker et al., 2010). Whether analyzing inequalities in the identification of gifted students (Barlow & Dunbar, 2010; Bernal, 2002; McIntosh, 1995; Yoon & Gentry, 2009), identifying students for talent search programs (Lee, Matthews, & Olszeski-Kubilius, 2008), investigating teacher’s beliefs about culturally, linguistically, and economically diverse (CLED) gifted students (de Wet & Gubbins, 2011), examining of special and gifted education programs (Donovan & Cross, 2002), analyzing student
underachievement (Ford, 1995), exploring ethnic identity and group orientation of gifted students (Worrell, 2007) or studying the academic experiences of low income gifted students (Wyner et al., 2007), one finding is consistent. By far, the most commonly identified risk factors for students with high ability not participating in gifted programs are socioeconomic status, race, and cultural and linguistic diversity. Based on most traditional measures of academic ability, the number of low-income high-ability students in the United States is estimated to exceed the individual populations of 21 states (Wyner et al., 2007).

Even among high ability students, racial and income disparities affect achievement (Ferguson et al., 2001; Plucker et al., 2010; Olszewski-Kubilius & Clarenbach, 2012, 2014). There is a measurable achievement gap between those who are from low socio-economic status (SES) families and non-dominant cultural groups and their more affluent, White peers (Wyner et al., 2007; Olszewski-Kubilius & Clarenbach, 2014). Factors that impact this achievement gap include issues regarding student identification for participation and support after identification, and issues related to pre-service teacher preparation and in-service professional development. The race, ethnicity and income of students in a school can also inform teacher expectations and impact curriculum offerings. Indeed, even when high poverty schools offer advanced courses, students from low-income families are less likely to take them. Wyner and colleagues (2007), for example, found that while 9% of students identified as gifted are in the lowest quartile for income, 47% are in the highest. Policies and practices intended to close the leaks in the college pipeline must address those factors that limit opportunities for students typically underrepresented in gifted education programs.
The Impact of Policy on Underrepresentation

There is a dearth of literature focusing on gifted education policy. Even so, there is a growing body of work exploring gifted education in public policy as it relates to state mandates, curriculum, identification, and funding. McBee, Shaunessy, and Matthews (2012), for example, examined the impact of policy on the development of more equitable access for underrepresented students. Swanson (2007) examined gifted program development and implementation from the unique perspectives of policymakers, district level administrators and school level practitioners. Gallagher (2002) and VanTassel-Baska (2006a, 2006b) delimited the study of policy in terms of resource allocation. Using South Carolina as a model, Swanson and Lord (2013) provided a conceptual framework to explore how state policy can be influenced and evolve. Brown, Avery, VanTassel-Baska, Worley, and Stambaugh (2006) provided a broader definition describing policy as "The rules, statutes, codes, and regulations adopted by state legislatures, interpreted by state school boards of education and state departments of education, and implemented by local school districts" (p. 11). The nature of implementation depends on the level of policymaking as suggested in the table entitled Levels of educational policy for gifted education found in Appendix C (Gallagher, 2015).

Although there is much debate as to the role the federal government should have in local schools, American schools’ most significant changes have been the result of the federal government’s input either through laws, through jurisprudence or through public policymaking (Lamiell, 2012). The Common School Movement in the mid-19th century, for example, was an education reform movement that created the United States’ public
school system as we know it today. Not only was this system designed to benefit individuals, but also to serve the common good of creating a people with shared cultural values from the many immigrant groups that were arriving in the new nation (Labaree, 2012).

The federal government has not only played a significant role in K-12 school systems, but also in college access. Another turning point in education reform was the GI Bill of Rights (GI Bill) or The Servicemen’s Readjustment Act of 1944. This law provided World War II veterans with educational opportunities that allowed them to go to college. This expansion in educational access, especially for African Americans, was the foundation for the later thrust of the civil rights movement for equality in education (Ravitch, 1983).

The field of Special Education also received significant federal support through the Individuals with Disabilities Education Act (IDEA) of 2004 and Section 504 of the Rehabilitation Act, which are among federal mandates that offer some guidance for serving students with special education needs. In addition, for the first time, Congress, in the Reauthorization of the Individuals with Disabilities Education Act (IDEA) in November 2004, acknowledged the needs of twice-exceptional children, those students who have both areas of giftedness and learning disabilities (Stein, Hetzel, & Beck, 2011).

Education rights of English Language Learner (ELL) students have also been addressed at the federal level with landmark court cases including *Lau v. Nichols* (1974). In this case, the Supreme Court ruled that providing the same learning materials was not the same as equal access if there are students who do not speak English. Another case that addressed the rights of ELL students was *Plyler v. Doe* (1982) wherein the Court
ruled that undocumented students could not be denied education in the K-12 system as schools are not responsible for the enforcement of immigration law. Support for gifted education, however, has ebbed and flowed as an issue of education reform (R. Miller, 1997; Colangelo, Assouline, & Gross, 2004).

Federal Policy

Part of the challenge to advocacy efforts is that, even among professionals in the field of gifted education, ideas about what constitutes giftedness vary (J. R. Cross & Cross, 2005; Sternberg & Davidson, 2005). Because there is no federal mandate for gifted education in the United States, the definitions of who should be considered in this target population are as varied as the states from which they emanate (M. R. Coleman & Gallagher, 1992). Often referenced in the consideration of federal policymaking impacting gifted education is the definition of gifted and talented students found in the Marland Report (1972) submitted to Congress as mandated by P.L. 91-230 in 1971. Many consider, however, the National Science Foundation Act of 1950 that funded research and support of math and science education as foundational to beginning to address the needs of high ability students on the national level. Other examples of policy and legislation that have impacted gifted education can be found in Appendix D.

Other factors besides research, however, may also inform policymaking. Using the grounded theory called educational turbulence, described as the “the interplay of external variables that directly influence school reform” (C. Johnson, 2013, p. 693), in a five-year study of 60 science teachers and nine administrators in a large, southwestern school district, C. Johnson (2013) found that both implicit and explicit policies on the micro level were impacted by macro-level educational policies. Specifically, C. Johnson
argued that the macro-level federal accountability policy greatly influenced the micro-
level local district’s strategic plan and resulted in the derailing of the educational reform
efforts that ultimately benefit students, the very goal of federal policy (C. Johnson, 2013).

**No Child Left Behind**

Although Gallagher stressed the stabilizing possibilities of policy to ensure support for gifted education, he also noted, when policy is the means by which improvements in education are attempted, there are often unintended consequences (Brown & Garland, 2015; Gallagher, 2002). Through *Brown v. the Board of Education* (1954), the nation sought to address issues of achievement for all students. This 1954 landmark case struck down *Plessy v. Ferguson* (1896), and the term "separate but equal" was determined to be unconstitutional (Ferguson & Mehta, 2004). In 1965, a year after the Civil Rights Act was passed, President Lyndon B. Johnson signed the Elementary and Secondary Education Act (ESEA) into law. President George W. Bush’s signature education reform law, Public Law 107-110 known as *No Child Left Behind Act (NCLB)* passed in 2001 and signed into law on January 8, 2002 is the updated version of the Elementary and Secondary Education Act (Barone, 2007).

A result of NCLB was that funding to local school districts focused on the progress of students who do not meet minimum proficiency standards and the new law linked access to Title I funds to academic standards and assessment requirements (Tanner, 2013; The Education Trust, 2004). Underachieving students are well researched and well supported by NCLB. There was no incentive created by the law, however, for schools to collect data on advanced learners or seek to increase the number of students achieving at advanced levels (Beissner, 2008; Chudowsky, Chudowsky, & Kober, 2009;
As a result of NCLB, policymakers at both the state and federal levels increasingly adopted high-stakes testing. This federal policy and consequential funding has narrowed the focus of the curriculum in many districts from seeking to ensure that all children reach their highest potential, to merely focusing on equity of outcome (Gallagher, 2004; Kozol, 2006). Because low-income, cultural minority, high-achieving students easily meet the proficiency goals of NCLB, they are often left out of the current policy discussion and are, too often, not challenged to achieve at their highest potential (Taliaferro & Decuir-Gunby, 2008; Wyner et al., 2007).

**Race to the Top**

In 2009, President Obama and Secretary of Education Arne Duncan announced *Race to the Top*, a program that was funded as part of the American Recovery and Reinvestment Act of 2009. This incentive-based program awarded points and additional funding to states that met certain policy prescriptions, including building data systems, providing performance reviews for teachers based on student performance, turning around failing schools, lifting caps on charter schools and implementing Common Core standards (U.S. Department of Education, 2009). Though not without controversy, with *Race to the Top*, the Obama administration attempted to address social and linguistic inequities by using competitive grants to spur innovation and improvement in the lowest functioning schools. It is considered by some to be a shift from promoting equity to promoting excellence (Baker, Oluwole & Green, 2013).
Teachers are the most important factor when it comes to student achievement, with research suggesting that students in schools with large, low-income populations are most affected by teacher quality (Darling-Hammond, Amrein-Beardsley, Haertel, & Rothstein, 2012; Mangiante, 2011). *Race to the Top* attempts to address teacher quality (“Race to the Top,” 2009). The terms “accountability” and “merit” are terms that have become ubiquitous in American society when evaluation of public school teachers is discussed (L. Johnson, 2011; Quigney, 2010). The idea that teachers should be evaluated on their effectiveness is reasonable and should be demonstrative of commitment to student learning and teacher capacity building. Since the implementation of NCLB, however, states have increasingly focused on testing as the measure of student outcomes (Watanabe, 2008; Duffett et al., 2008) and through *Race to the Top*, this focus on high stakes testing was linked to teachers’ evaluations in many states (Hursh, 2013). Results of high stakes testing of students as the primary determinant of teacher effectiveness unfairly assesses both general classroom and gifted education teachers (Ravitch, 2014).

Flores and Derrington (2015) pointed out that the main purpose of teacher evaluation is to promote teacher growth. Determining what are fair criteria to use for this articulated purpose is more difficult to ascertain. The question of fairness must also be considered when linking the evaluation so closely to student test scores. How then, would teachers who do not teach grade levels or courses that are evaluated by standardized tests be assessed? This question is hotly debated not just in the United States, but also throughout the world (Santiago & Benavides, 2009). Welsh (2011) pointed out the challenge of measuring good teaching is dependent upon the subjects and students.
Effective teaching with one group of students may not translate into effective teaching of another.

For example, to begin to consider how teachers of high ability students should be evaluated, one must consider how they are trained. Robinson (2008) pointed out that the literature on high-ability student achievement is primarily focused on teacher characteristics and high ability learners (Robinson, 2008). Starko (2008) suggested that discussions must begin with a determination of which kind of teacher of high ability students one is discussing. If the conversation is regarding teachers who specialize in gifted education versus teachers who, within the general education classroom, must also differentiate in order to address the needs of gifted students, the preparation must be different. Starko stated:

This leads to two questions to be considered: (1) What types of preparation are appropriate for specialists in gifted and talented education and (2) what types of preparation regarding gifted and talented education should be required of all teachers preparing to teach heterogeneous classes? (p. 683)

There are observable strategies that have proven to be effective with gifted students; yet, if questions of appropriate preparation for teachers of gifted students cannot be uniformly answered, then it is no wonder that questions as to the most appropriate way to evaluate them are difficult to answer as well. The focus on standardized testing is unlikely to truly measure growth in the most effective way with gifted students. As a result, teachers may not be evaluated on the strengths of their training and the true growth of their students.

Value-added modeling (VAM) is one method of evaluation of teachers that has become increasingly popular as a means of assessing teacher effectiveness because many
think it provides a way to measure growth of all students that is more accurate. As a result, it has been adopted by several school districts including Washington, DC, and states including New York and Tennessee (Baker et al., 2013; Mangiante, 2010). In theory, VAM is used to assess a teacher’s contribution to student growth by comparing the student’s scores with the previous year’s scores. Statisticians compare the scores from year to year. The goal is to be able to determine the specific contribution a particular teacher makes in a given year compared with the students’ previous teacher. Critical to the formula is the assumption that students’ growth from year to year is usually within about the same range. The formula-generated score is compared with a student’s actual score, and is supposed to result in a metric that determines what growth was due to the teacher and the school (Hanushek, 2011).

VAM is not without its critics, who point out there is no consideration in these calculations for missing data, the students’ socio-economic status, parental involvement, outside tutoring, or the students’ natural ability. There is no consideration of student mobility from school to school or district to district within a given school year (Baker, Oluwole & Green, 2013; Mangiante, 2010). Teachers’ causal effects may not be correctly indicated by VAMs (Rothstein, 2008). In an examination of three VAM models used in North Carolina, Rothstein (2008) found that each relied on incorrect exclusion restrictions, with results indicating future teachers’ (5th grade) impact on students’ past achievement (4th grade). As a result, he suggested their impact on teacher evaluations be minimal. Sanders (2003) stated, “three elements are necessary for VAM to be viable:

1. Close, but not perfect alignment of assessments and curriculum;

2. appropriate reliabilities; and
3. sufficient ‘stretch’ in the assessments to show growth” (as cited in Eckert & Dabrowski, 2010, p. 89).

Most state assessments, with their goal of measuring minimum proficiency, are unlikely to have “sufficient stretch” to assess students with high ability (Plucker et al., 2010; Wyner et al., 2007). Gifted students’ test results often present a regression toward the mean. Therefore, it is unlikely that VAM will adequately measure growth and result in an adequate evaluation of the impact of the teacher on student achievement (“Frequently asked technical questions about value-added analysis,” 2006).

President Obama described these changes in teacher evaluation as vital to address what was considered by his administration to be a crisis in public education. Critics, however, see the changes as consistent with the neoliberal philosophy of deregulation and privatization. Butler (2014), Kurth-Schai (2014), and Martinez and Garcia (2000) are among researchers who argue that public policy is increasingly dominated by the underlying neoliberal political philosophy purporting that social services such as education should be provided using a free market approach. In this light, the goal of education is framed as simply a means by which to foster economic growth and, is, thus, possible to quantify (Butler, 2014; Kurth-Schai, 2014; Martinez & García, 2000; Stern, 2013).

From this perspective, Race to the Top is criticized as another means by which public institutions, and those who work in them, including educators, are disparaged in order to justify increased privatization and reduction in public funding (Hursh, 2013). Debates around teacher effectiveness linked to minimum proficiencies leave both the lowest and highest scoring students out of the conversation. Schools are incentivized to
prioritize support for students who are in the middle as it relates to achievement who are more likely to make the difference in a school’s accreditation status (Neal & Schanzenbach, 2010). Prioritizing the needs of high ability students from African American, Native American, Latino and ELL communities, who are often from low income households, becomes less likely and, as a result, becomes another factor that influences underrepresentation in gifted education programs.

**Poverty and Funding Policies**

Perhaps the clearest expression of policy priorities is the budget. It can be argued that budget is policy. From preschool through higher education, what is deemed important is clearly identified by its place in the hierarchy when funding is prioritized. While Gagné (2004) discussed environmental factors as critical to talent development, whether gifts are developed into talents is often influenced by one particular environmental factor—poverty. Poverty, however, is not monolithic, and this understanding is vital in order to support talent development among students from poverty (Gornick & Meyers, 2003; Wertheimer, Croan, Moore & Hair, 2003).

Although the constructs of low income and poverty are foundational to social science and education research, defining and measuring the constructs are often challenging (Sirin, 2005). The U.S. Census, for example, uses the poverty threshold developed in 1963-1964 by Mollie Orshansky, an American economist and statistician. This cash-based formula is derived by tripling what Orshansky determined to be the typical cost of food for a family of four (Fisher, 2008). The current cost of today’s families’ basic needs, usually including the cost of childcare and higher taxes, is not considered in this formula. Nor does the formula factor in the impact of the family’s
geographic location or whether they receive governmental services such as healthcare insurance, childcare assistance or food stamps (Coley & Baker, 2013; Meyer & Sullivan, 2012). For the studies included in this review, the poverty measure most often used was eligibility for free or reduced-price lunch.

Despite the lack of agreement on how poverty should be measured, there is little argument as to the negative academic, health and life outcomes that most often result from growing up poor. These effects begin at birth and continue through life, from higher rates of infant mortality to beginning kindergarten behind in pre-reading and mathematics skills to an increased likelihood of dropping out of school (Gornick & Meyers, 2003; Schweinhart, et al., 2005). Wertheimer et al., 2003). According to a 2014 report by the United States Census Bureau, 14.5% of American families in 2013 lived in poverty. This represented a decrease since the previous report, but still reflected 14.7 million American children living in poverty with half living in extreme poverty. For Black children, there was no benefit derived from the overall decrease in that there was no change in the numbers of Black children living in poverty (National Center for Children in Poverty, 2014).

Many districts depend on local property taxes to fund their schools, resulting in a great deal of incongruity in the quality of public schools attended by children based on the circumstances of their neighborhoods. A disproportionate number of low-income students attend schools lacking enriching learning opportunities and academic rigor (Baker, Sciarra, & Farrie, 2010). In a study of North Carolina, Ohio, Maryland, and Virginia school districts, W. G. Bowen, Chingos, and McPherson (2009) described a high school’s academic level based on measures such as ACT/SAT and AP course-taking.
patterns as the strongest predictor of bachelor’s degree attainment. Because their schools often focus on lower level instructional strategies and high stakes test preparation, too many low-income students lack opportunities to take courses with sufficient academic rigor for their talents. Ford and Whiting (2007), for example, examined the lack of representation of African American students in Advanced Placement (AP) classes and noted that there are fewer AP course options in settings with more students from low income and/or non-White populations. They pointed out, “Students cannot participate in courses that do not exist” (p. 24). This lack of opportunity lays the foundation for further missed opportunities later in life (Engstrom & Tinto, 2008; Reis & Renzulli, 2010).

Upon examination of the relationship between state policies and the distribution of educational opportunity, Baker and Friedman-Nimz (2004), found that more funding, in general, and more funding for gifted education, in particular, was available in schools with fewer students from families with low incomes. If school finance policy is an indicator of a state’s commitment to equity and excellence in education, the results of the Education Week Research Center’s Quality Counts equity metrics suggest little has changed in recent years (“Preparing to Launch,” 2015). This report card was intended to assess how well states meet several measures foundational to standards-based reform. One such measure, the Wealth Neutrality Indicator, assesses levels of funding across districts and how state and local revenue are related to the property wealth of districts. The Wealth Neutrality indicator is important to consider as it relates to equity in funding for students from poorer districts versus that for students from wealthier districts. Students from wealthier districts typically have better funded schools. Only Alaska, Kansas, Nebraska, Nevada, Utah, West Virginia, and Wyoming provide higher funding in
poorer districts (Lloyd & Swanson, 2014).

Darden and Cavendish (2011) examined the intradistrict disparities and the resulting opportunity gaps created by an equality versus an equity approach to resource distribution. They noted the disparities not only affected monetary allocation, but also affected nonmonetary resource distribution between schools with more affluent, White students and schools with more high poverty, non-White students. The inability to move unused funds from schools in one area to schools in another area leave poorer schools unable to address inequities. Darden and Cavendish (2012) pointed out, “If left over funds could be made available to the poorer schools, schools could use the extra funds to better train their teachers or even create financial incentives for recruitment of more seasoned, higher-quality teachers” (p. 65).

From its beginning with the intelligence testing (Mansfield, 2007) to what some researchers consider to be its role in the re-segregation of public schools (Ford, 2014; Staiger, 2004), gifted education is considered by some to be a tool that maintains classism and racism within public school settings (Barlow & Dunbar, 2010; Stark, 2014). Noting that the Intelligence Quotient (IQ) of 130 was once considered the minimum score for gifted program participation, J. R. Cross (2013) pointed out that the origin of gifted education was a response to a need to ensure that students with the highest academic potential were also provided an appropriate education commensurate with their abilities. Citing Bracken (2012), she argued that the goal of providing more inclusive gifted education programs that use multiple criteria for identification, to be further discussed in this chapter, has resulted in the average IQ of students in gifted education programs now being 115. The students at the highest end of the ability spectrum, as a consequence, may
now be underserved even in their schools’ gifted education programs. Noting Borland’s (2003) suggestion that advocates for gifted education may need to be willing to consider gifted education without the focus on identification, J. R. Cross (2013) challenged advocates in the field to consider differentiation strategies that can be used in regular education classroom as a means to serve gifted students appropriately while also ensuring that all students receive an excellent education. Strategies suggested included cluster grouping and acceleration. J. R. Cross cautioned when more affluent parents feel that public school gifted education programs no longer provide the challenge their children need, they simply move them to private schools (Baker & Richards, 1998). Less economic diversity in the public schools predicts greater inequality in the academic experiences of underrepresented students (J. R. Cross, 2013).

**Gifted Program Identification Policies**

Some critics of gifted education have claimed that its roots are in intelligence testing (IT) and that IT’s roots are actually in the eugenics movement of the 19th and 20th centuries that advocated the need to breed out those deemed to be of lesser human stock (Oller, 1997; Winfield, 2012). The analysis of the test results did not factor in the potential impact of a test normed on English-speaking White Americans on immigrant, non-English speaking populations nor did it factor in the legacy of slavery—a multigenerational lack of educational access for those of African descent among those tested (Carroll, 1982; Valencia & Suzuki, 2001). Testing is central to identification for placement in gifted education programs in most communities; therefore, many argue that the developmental goals behind intelligence testing still impact the educational outcomes for non-White, English language learners and/or low-income students and continue to
result in underrepresentation of African American, Latino, Native American and/or low-income students in gifted education programs.

**States’ Identification Protocols**

The cultures of states may also impact the development of gifted program identification protocols that lead to underrepresentation of certain populations of students. In a study of states’ identification models, M. R. Coleman and Gallagher (1992) posited that underrepresentation of certain groups of students in gifted education programs is the result of the lack of a federal mandate for gifted education in the United States. This lack of a mandate has left the determination of identification protocols to each state, resulting in great variation in the requirements from one state to another (M. R. Coleman & Gallagher, 1992). More than twenty years have passed and little has changed in states’ protocols (“National Association for Gifted Children [NAGC] & Council of State Directors of Programs for the Gifted [CSDPG],” 2013).

Intelligence tests are still the only method of identification for participation in gifted education programs in many public school districts. In the 2012 – 2013 National Association for Gifted Children *State of the States in Gifted Education* report, 18 of the 38 respondents reported that the only indicator considered by their states for gifted program participation was IQ tests (NAGC & CSDPG, 2013). Reliance on results from a single test taken on a single day limits the conception of intelligence to an entity that is not malleable or impacted by environmental factors, including family and school; rather than a flexible notion of aptitude that can be the foundation of talent development (Lohman, 2006). The call for multiple measures as a part of identification protocols challenges the notion that a single test can most effectively measure intelligence and
strengthens the argument that who is considered to be an intelligent person is based on the circumstances that form the setting in which this “intelligence” is evaluated. Intelligence tests most often used in the United States have, by default, created circumstances that have led to certain populations of students being historically underrepresented in gifted education programs limited by this one tool for assessment.

Cultural and contextual differences in the meaning of intelligence complicate its measurement. Even while refuting the notion that all members of a particular cultural group will think about intelligence in the same way, Benson (2003) identified some distinctions based on culture as experience in the understanding of intelligence. Western notions inform most intelligence test development used in the US, therefore, Benson sought to specifically examine the understanding of intelligence as presented in the literatures that went beyond Western notions. In comparing Western and Eastern cultures, she found the literature suggested that Western cultures were more inclined to define intelligence in terms of the individual’s ability to categorize and devise a rational argument as opposed to Eastern cultures where intelligence was viewed as the way by which one identifies societal complexities and plays his or her role responsibly (Benson, 2003).

Sternberg (2004) suggested that one must look beyond one’s own cultural lens to fully understand and identify solutions when determining how to address challenges across cultures including how to quantify “intelligence” since the notion among cultures can be so different (Sternberg, 2004). Benson (2003), for example, described Taiwanese-Chinese conceptions of intelligence as emphasizing understanding and relating to others—including knowing when to show and when not to show one's intelligence. She
pointed out that even in the words used in non-Western cultures to describe intelligence, many do not translate conceptually especially in rural African communities where Western education is not as common. Benson (2003) agreeing with the conclusions of Serpell’s (2011) study of perceptions of intelligence among the rural Chewa people of eastern Zambia, noted he found the concept of nzela included both the notion of cleverness (chenjela) and of social responsibility (tumikila), and that there was little distinction between the two ideas (Serpell, 2011). This points to the still relevant question: “Are ‘culture-free’ or ‘culture-fair’ intelligence tests possible, or is success on a test inevitably influenced by familiarity with the culture in which the test was developed?” (Benson, 2003, p. 57).

Lohman (2006) pointed out that what is primarily represented by the outcomes of tests is previous opportunities to learn. He, along with several leaders in the field of gifted education, called for multifaceted protocols for identification, noting the need to consider the potential impact of income and culture on performance on IQ tests (Elliott, 2003; Frasier, 1997; Passow & Frasier, 1996; VanTassel-Baska, Feng, & Evans, 2007; VanTassel-Baska, Johnson, & Avery, 2002). Lohman (2006), for example, suggested that gifted program identification practices for students from underrepresented groups should not only consider high accomplishment, but high potential:

The best programs for academically gifted children see their mission as developing talent—not merely discovering it. Programs might better communicate this goal to the public if they emphasized more their role in developing academic excellence and spoke less about giftedness. Anyone can aspire to excellence. Giftedness, however, has connotations of fixedness that are
rightly resented by those who score lower on tests that measure the abilities and
achievements used to define the construct. (p. 11)

Nisbett et al. (2012) argued, however, “intelligence test scores remain useful when
applied in a thoughtful and transparent manner” (p. 131).

Nonverbal tests have been described as a fairer means of assessing students who
are from groups typically underrepresented in gifted education programs. Nonverbal tests
that used figures and patterns as tools for assessment, such as the Army Beta were
developed along with the precursor to the IQ test, the Army Alpha at the beginning of the
20th century. In recent years, the Naglieri Nonverbal Abilities Test (NNAT) (Naglieri,
1997) has been described as effective in identifying students from non-dominant cultural
groups or with low SES (Naglieri & Ford, 2003). Lohman (2005) and other researchers,
however, challenged the analysis of data supporting these claims due to what he
considered to be issues with sampling and other methodologies used in the study
(Carman & Taylor, 2010; Lohman, 2005). He argued that nonverbal tests should not be
used alone but as part of multiple criteria in that, just as IQ tests can, they, too, can create
bias. This can lead to the selection of students for participation in gifted education
programs who would be better served in enrichment programs that would equip them for
future demonstrative academic excellence (Lohman, 2005).

McBee (2006) noted that equipping classroom teachers to understand gifted
behaviors is imperative since they provide most nominations for gifted education
programs (McBee, 2006). Deficit thinking in teachers is often linked to the low rates of
referral of African American, Latino, Native American, ELL and/or low-income students
for participation in gifted education programs. This mindset of low expectations based on
racial and class bias within the school context can be a barrier to identification (Ford, Grantham, & Whiting, 2008; Harradine, Coleman, & Winn, 2014). Harradine and colleagues (2014) sought to address deficit thinking through the use of the Teacher’s Observation of Potential in Students (TOPS) in the Using Science, Talents, and Abilities to Recognize Students ~ Promoting Learning for Under-Represented Students (USTARS~PLUS) program. They sought to determine if the instrument could impact potential deficit thinking that could influence whether underrepresented students would be identified for participation in gifted education programs.

The TOPS was implemented in a study of 100 schools and 1,115 classroom teachers in four states, many in Title I schools with student populations representative of the demographic make-up of their states. The participants represented novice, experienced and veteran teachers evenly with 95% female, 88% White, 10% African American, and 2% Latino. After the initial 3-6 week observation period with the whole class, the teachers used the Individual Student Observation form for another 3-6 weeks. At the project’s completion, the Individual Student Observation form had been used to examine 1,972 students. Of that number, gender and ethnicity data was available on 1,741. Teachers reported that 436 students would not have been identified without the TOPS, with nearly half of that number (48%) non-White. That 48% included 21% African American boys, and 5% Latino boys (Harradine et al., 2014).

Misconceptions exist about those learning a new language that may impact their identification as well (Brulles, Cohn, & Saunders, 2010; Lewis-Moreno, 2007; Reed, 2007). Lewis-Moreno (2007) observed:
If myths and misconceptions about those learning a new language are accepted, the type and quality of instruction for ELL students can be adversely affected. Teachers who adopt an ecological approach take the initiative to learn how to address the needs of diverse learners in their mainstream classrooms. They don’t expect the ESL teacher to “fix them’ first.” If you often hear such comments as “How can he be gifted if he doesn’t even speak English?” or “She’s ESL! She can’t be in an honors class,” it is unlikely that ELL students will be well represented in programs for the gifted and talented or in honors and advanced courses. As a result, the long-term educational opportunities for ELL students will not be equal to those of their English-speaking peers. (p. 772)

Communicating in the manner necessary to be successful in higher education and beyond is essential when issues regarding the college pipeline are considered. This includes the ability to express abstract concepts in a clear comprehensible manner. Written language is the vehicle by which most communication in the educational environment is conveyed (Charity Hudley & Mallinson, 2011; D. Johnson & VanBrackle, 2012). Academic language is difficult for students, whether standardized English is their first language or not (Archer, 2010). This includes students who may be speakers of variations of English such as African American Vernacular English (AAVE), as well as students for whom English is not their first language. At the 2011 Annual Business Meeting of the National Council of Teachers of English (NCTE) in Chicago, Illinois, while defining “home language” as “the language used in students’ family and community lives, such as African American Vernacular English, Spanish, Mandarin, among many others,” NCTE noted this potential impact (National Council of Teachers of English, 2011, para. 6).
Based on the idea that all students who are verbally gifted need comprehensive training in writing that is adequately challenging, The Johns Hopkins University developed the Program for Verbally Gifted Youth. The objective of this writing skills program was not to teach creativity, but to give structure and form to the creative impulse often said to be lacking in college freshman students’ writing, including those who scored well on the AP English exams (Reynolds, Kopelke, & Durden, 1984; Steinway, 2008). These factors affecting writing are often exacerbated in the case of ELL students due to their first language features, and determined by their level of oral and written English language proficiency (Huang, 2009). Finding appropriate strategies for developing their writing talent include explicit instruction and deliberate criticism to promote student growth (Reynolds et al., 1984). Teacher professional development is vital to ensuring that teachers are equipped to offer students this instruction and support.

Frank (2007) demonstrated the potential for professional development to address issues of deficit mindset in teachers that may impact identification for gifted education based on language. In a quasi-experimental study within a Texas school district, she identified two elementary schools for participation. Participation was based on pre-established criteria including a willingness on the part of the district’s superintendent and the schools’ principals to take part in the study. In addition, the participants represented a district that had not identified any migrant students for participation in gifted education previously. Further, the participating schools had to have student populations less than 5000. While one school served as the control group, teachers from the other participated in three one-hour professional development opportunities after school on the cultural influences on learning styles. Frank found that in the school where teachers received
professional development that allowed them to recognize gifted characteristics outside of their own cultural lenses, migrant students were identified for gifted programs. In the school where teachers did not receive professional development, migrant students continued to go unidentified. Teacher attitudes, then, can be a potent predictor of underrepresentation.

**Summary**

There are certain factors that predict whether students will be selected for participation in gifted education programs or predict their exclusion. The literature suggests that students from poverty and/or certain demographic groups including African American, Latino, Native American or non-native English speaking families are less likely to be identified, referred, placed or supported in gifted education programs. Federal, state and local policies, or the lack thereof, impact the school level experiences of all students, and, in many cases, predict whether appropriate academic rigor will be available for culturally, linguistically or low income high ability students in their public schools. Many districts have experienced a narrowing of curriculum due to NCLB. State and local policies vary greatly from district to district with the IQ scores remaining the gatekeeper in many places. To advocate effectively for policy that creates a college pipeline for low-income high ability students will require strengthening pathways to access opportunities for academically challenging experiences in public schools; but also, building collaborative networks in communities. For high ability students from low SES families, removing barriers to participation in gifted education programs is an important first step. After selection for participation, providing students resources and psychosocial support in an affective environment that nurtures talent development is vital.
Potential Solutions to the Problem of Underrepresentation

“There is no universal gifted child, only children who are more able than others in some areas of life. However, there are still clusters of these students waiting for someone to challenge their special talents” (Gallagher, 2004, p. xxiv).

Abilities: Talent Development

Olszewski-Kubilius and Thomson (2015) pointed out that, although the discussion of the concept of talent development has recently been within the context of a framework for the consideration of what giftedness is and how best to educate gifted children, it is not a new concept. It has been explored in the writings of previous researchers in the field of gifted education who sought:

A broader conception of intelligence and ability, beyond IQ; a recognition of the role of noncognitive traits in gifted achievement; and a focus on serving a broader range of gifted students with varied program models and services, especially typically under-identified students such as socio-economically disadvantaged, promising learners. (Olszewski-Kubilius & Thomson, 2015, p. 49)

Robinson (2012) emphasized the positive potential of the theoretical construct of domain-specific talent development for gifted education advocates. She also pointed out the potential drawbacks to a change in lexicon in that programs could be weakened if gifted education policy language that is already in place in states and local districts is changed to reflect the construct of talent development. In certain fields where leaders are “moved by data, rationality, and the bottom line” (p. 203) she felt an unintended consequence of a change in statutory language could result in services being weakened and funding for gifted children being reduced (Robinson, 2012). As aforementioned in the discussion of
the impact of a school’s budget on the academic opportunities its students may expect, fewer funds for gifted education programs in public schools would most adversely impact the options available to students whose families cannot afford to pay for opportunities outside of the public school setting (J. R. Cross, 2013).

With his Differentiated Model of Giftedness and Talent (DMGT), Gagné (2004) distinguished between gifts and talents. He described gifts as natural abilities that suggest potential and talents as the mastery or development of those abilities. The development of those abilities, he argued, is linked to teachers and/or parents or other environmental catalysts, or to intrapersonal catalysts such as intrinsic motivation for mastery (Gagné, 2004; Garrett & Moltzen, 2011).

**Multiple Criteria and Early Identification**

The availability of research on where the most potential lies in program models and strategies for developing the talents of students typically underrepresented in gifted education programs continues to increase. Researchers have called for addressing African American (Frasier, 1997), Latino (Bernal, 2002), Native American (Gentry & Fugate, 2012) and low-income (Peters & Gentry, 2010) underrepresentation in gifted education programs. Bernal (2002) pointed out the need to identify strategies that will work in an increasingly litigious political climate hostile to what can be perceived as affirmative action policies (Bernal, 2002). In addition to suggestions regarding gifted program staffing, he proposed that multiple criteria be used for identification for participation in gifted education programs. In addressing those issues related to how IQ and other intelligence tests limit access, multiple criteria begins to level the playing field for populations of typically underrepresented students (Borland, 2004; Reis & Renzulli,
Early identification for participation in gifted programs and expanded protocols for identification are strategies recognized for their effectiveness (Passow & Frasier, 1996; Yoshikawa et al., 2013). Framing the goal as seeking more effective means for the identification of talent potential in underserved populations, Passow and Frasier (1996) stressed the benefit to students from all populations when educators learn to more effectively identify potential in students typically underrepresented in gifted education programs. As Passow and Frasier (1996) noted:

Decisions about giftedness in children are never more than predictions. Consequently, wide nets should be thrown to increase the power of those predictions, erring on the side of over-inclusion rather than exclusion, especially at the early stages of selection. (para. 24)

As a result, schools are beginning to change their identification practices.

Borland, Schnur, and Wright’s (2000) description of Project Synergy, a 7-year federally funded research program targeting very young children provides one example of researchers seeking to identify and assess the most effective methods for identifying students from economically disadvantaged families who were potentially gifted. This program, using multiple identification criteria, began in 1990 with a cohort of 15-18 potentially academically gifted kindergarten students from central Harlem’s public schools identified with non-traditional measures such as portfolio assessment. Borland et al. (2000) noted that this model required, “an understanding that giftedness manifests itself in different ways in different settings, and that, in order to understand these
manifestations, one must understand the setting” (p. 28).

Exemplifying the consultation model suggested by Calderon, Subotnik, Knotek, Rayhack, and Gorgia (2007), the program included supporting teachers and parents who were a part of the students’ lives to be effective partners in their development. Through workshops covering a wide range of topics, the goal was to equip parents and teachers in understanding the way the system worked and how to most effectively advocate for their children within it (Borland, 2004; Borland et al., 2000). Noting that it is unlikely that most of the students in the study would have been identified using traditional measures, Borland (2004) stressed the importance of conceptualizing identification as a “process, not an event” (p. 20), with certain features, is a more valuable approach. He argued that this approach was ultimately less mechanical and more like a case study, and like a case study should include observation protocols and portfolio assessments that focus on the student’s curriculum-based performance, not merely standardized test scores. Also identified as critical were open-ended teacher referrals developed to replace checklists. This approach was articulated in T. L. Cross and Coleman’s (2005) school-based conception of giftedness. Borland and his colleagues (2000) described the inclusion of transitional services after students were identified as key to the program’s effectiveness:

We suspect that there are many students living in poverty and attending schools where expectations for their academic achievement are minimal who have the innate capacity to achieve academic giftedness. Identifying these students is only part of the task. We believe that placing them in traditional gifted programs without adequate preparation, without accelerating their learning so they can make up for time lost, would, in most cases lead to failure. Structured, well
thought-out intervention designed to bring students from the status of potentially academically gifted to academically gifted is needed and ought to be a priority in our field. (p. 30)

As a result of program participation five students, roughly 5% of the kindergarten class from a school where no students had previously been identified, were not only accepted into a school for academically gifted students, but were successful once admitted. This project exemplified how Lohman’s (2005) suggestion that to ensure student success, nontraditional measures used to identify high potential students must lead to placement in enrichment programs that will equip students for high achievement before students are placed in traditional gifted education classes. Multiple criteria, early identification and cultural competency were all part of the foundational design for this enrichment program that provided a bridge from talent potential to demonstrative achievement for Project Synergy participants (Lohman, 2005).

As in Project Synergy, early identification was also found to be central to Winsler, Gupta Karkhanis, Kim, and Levitt’s (2013) study of 7,000 Miami males, the majority of whom were low-income and of African descent. They found certain predictors for gifted education program participation were stronger when students were identified in kindergarten. These predictors included 4-year-old preschool attendance, high scores on cognitive, behavioral, school readiness skills, emergent literacy and fine motor tests before entering kindergarten. In addition, if students were older when they entered kindergarten, were bilingual and had higher scores in math and reading on standardized tests, these factors also increased the odds that they would be identified for participation in gifted education programs (Winsler et al., 2013).
Creating the Environment: Administrative Support

Principal leadership. Support for talent development cannot be limited to in-school time, but also must include meaningful out-of-school time experiences, summer and Saturday programs with enriched curriculum and higher level opportunities. These allow students to have the academic experiences that may not be available in their schools where the focus may be on meeting minimal standards (VanTassel-Baska, 2005). The cost of out-of-school time academic enrichment experiences, however, is prohibitive for many students from populations typically underrepresented in gifted education programs (DeLong, 1994). Thus, this makes ensuring academic rigor and the appropriate affective environment for gifted students in their public schools imperative. Effective collaboration among educators is an important first step. In a study of 300 administrators, 300 gifted education specialists, and 300 regular classroom teachers, Schroth and Helfer (2008) found all three groups of educators had distinct preferences of particular methods of identification and particular distrust of other methods with preferences and areas of distrust aligning based on the individual’s role. The researchers suggested that students might benefit from the provision of better services with the development of shared understandings among professionals (Schroth & Helfer, 2008).

Principal leadership is critical to the experience gifted students have in school and, ultimately, to student achievement. Daily decisions that principals make impact climate and indirectly affect student learning (Louis, Dretzke, & Wahlstrom, 2010). Instructional leadership that provides high quality staff development opportunities can impact how teachers work with students and with each other (Lewis, Cruzeiro, & Hall, 2007). It can also impact how teachers understand gifted education, characteristics of
gifted students and the impact of students’ cultures on gifted behaviors, which, ultimately, has the potential to impact underrepresentation in gifted education programs (Frank, 2007; Harradine et al., 2014; C. Tomlinson & Jarvis, 2014).

Over a 4-year period, C. Tomlinson and Jarvis (2014), in a multiple case study, examined three school sites that had reputations for demonstrably effective practices that led to the academic success of low-income minority students. Through individual interviews of teachers and administrators and focus group interviews of students as well as through publications, student achievement data, lesson plans, and work samples, the researchers found that practices at each site, to varying degrees, supported academic achievement at high levels. Only two of the three sites, however, effectively supported low-income, high-ability students’ achievement through the project’s completion. This was attributed to a change in principals in the middle of the study from one with a strong vision for supporting practices that had been effective with underrepresented gifted students to one who did not maintain support of those practices.

Access to the site became increasingly difficult as the study progressed and a new principal assumed leadership of the school. As data collection continued, a lack of common philosophy and set of practices among its mostly veteran teaching staff became evident and early promising efforts diminished. It became increasingly difficult to find clear examples of the school’s success with the target population.

(C. Tomlinson & Jarvis, 2014, p. 200)

This study demonstrated how the principal can impact the experience of low-income, high-ability students both positively and negatively (C. Tomlinson & Jarvis, 2014).
The role of school counselors. In addition to principals, school counselors are also critical to the experience students, who are typically underrepresented in gifted education programs, have. Counselors also impact the climate in a school and greatly impact whether students feel that they are supported in their academic aspirations and have a safe place to share their experiences (T. L. Cross & Burney, 2005; Henfield, Washington, & Byrd, 2014). T. L. Cross and Burney (2005), through Project ASPIRE, targeted 21 counselors from small rural schools in an effort to expand the talent development conversation to include counselors. For three years, they were exposed to literature on students from poverty, expert presentations, research and reflections on practices that had proven to be successful in working with high ability students from poverty.

Three themes emerged from their feedback. First, students did not wish to enroll in rigorous courses because they felt it was too time-consuming. Second, school climate often was not supportive of students taking advanced classes. This was particularly true of girls’ experiences. Third, students from poverty were subject to social norms such as the expectation that did not support moving away from home to pursue an education or distrust of the government which did not allow for the provision of information necessary for the completion of forms such as the Free Application for Federal Student Aid (FAFSA) and other federal forms necessary to make application for financial aid (T. L. Cross & Burney, 2005).

Through the examination of opportunity gaps impacting African American males, Henfield et al. (2014) also identified ways that school counselors could be a part of the talent development conversation. They maintained the importance of providing a place
where African American males can feel safe to discuss their school experiences, including the anti-intellectual stereotypes they often face even while participating in gifted education programs. Moreover, they stressed the importance of multicultural counseling with culturally competent counselors. Multicultural counseling and therapy was defined by Sue and Torino (2005) as:

- both a helping role and a process that uses modalities and defines goals consistent with the life experiences and cultural values of clients; recognizes client identities to include individual, group, and universal dimensions; advocates the use of universal and culture-specific strategies and roles in the healing process; and balances the importance of individualism and collectivism in the assessment, diagnosis, and treatment of client and client systems. (as cited in Sue & Sue, 2013, p. 46)

Other strategies suggested for impacting the affective environment so critical to talent development were data collection as a tool for documenting the in-school experiences of Black males in order to inform school-wide practice, and facilitation of cultural competency professional development by counselors for their peers to make schools “inviting and hospitable to Black males” (Henfield et al., 2014, p. 149).

**Domain-specific Talent Development**

Identification and replication of demonstrably effective programs, practices, and models is increasingly called for by researchers in the field of gifted education (Plucker et al., 2010; VanTassel-Baska & Stambaugh, 2007). Because developmental trajectories are domain-specific, timing is a vital consideration in the talent development conversation. Subotnik, Olszewski-Kubilius, and Worrell (2011) acknowledged the need to understand
the interaction of domain-specific ability and deliberate practice. Pointing out that all children do not learn in the same way and at the same pace. VanTassel-Baska (2005) described policies regarding acceleration, differentiated curriculum, differentiated instruction, and appropriate assessment as “nonnegotiables” for talent development in schools. She suggested that these policies be enacted in order to ensure that sensitive periods for development are not missed.

How suitable the assessment instruments are to evaluate potential in specific domains should also be given careful consideration (Andersen, 2014; Mann, 2014). Pointing out the limitations of the IQ measures commonly used in the identification of science, technology, engineering and math (STEM) talent, Andersen (2014) stressed the need to consider visual-spatial ability in the STEM identification process as well. Kell and Lubinski (2013) also noted the connection of spatial tests to less socially valued vocational fields and the limitations of tests typically used in college admissions processes, such as the SAT, for students with spatial abilities. They stressed the importance of educational institutions incorporating spatial ability into research on curriculum development and training to ensure that students with STEM potential due to their spatial ability can be identified and served.

Like spatial ability, the assessment of creativity is often undervalued. Grantham’s (2013) study of the works of Torrence and his development of assessments for giftedness observed the impact on minority and low income students, particularly black males, of his inclusion of creativity in the definition of and assessment of giftedness. Noting Torrence conviction that definitions of giftedness that were solely based on IQ test scores were racist strategies developed to maintain segregation and to deny access to Black and
poor children to gifted education programs, Grantham stressed the value of Torrence Test of Creative Thinking (TTCT) in providing an equitable means for testing for participation in gifted education programs (Grantham, 2013).

Creativity is often expressed through the use of spatial abilities. Silverman (2004) pointed out the value of art, chess, maps, and puzzles among examples of how spatial abilities are employed. She noted Seeley (2003), in a study of gifted juvenile delinquents found that as many as 25% of the population demonstrated creative and spatial abilities:

High fluid ability versus crystallized ability and high visual-spatial versus auditory-sequential learning style are found among many high risk gifted youth.

These fundamental conditions can have a great impact on the students’ competence and motivation” (as cited in Silverman, 2004, p. 1).

Seeley suggested students whose needs are not met become disengaged which may explain the large number of gifted students who drop out of school and/or find themselves in juvenile detention centers. Perceptions of the value of a domain of talent is often linked to decisions about what is measured. What is measured often determines whether the effort will be made to develop pedagogies that support talent development for students with that domain of talent.

**Curriculum**

Academically rigorous curriculum can be an important tool for identification of underrepresented students. Research-based curriculum is central to effective talent development models as well. This is particularly important since in many school districts, NCLB effectively limited curriculum, making minimal accountability measures the instructional priorities (Reis & Renzulli, 2010; Wyner et al., 2007). In a mixed-methods
study of the Javits-funded demonstration project, *Project Breakthrough*, Swanson (2006) sought to determine if high-end curriculum developed for gifted students would not only benefit all students, but also help identify underrepresented gifted students. In addition, researchers wanted to determine what professional development activities positively impacted teachers who were trying to change their practice in the classroom (Swanson, 2006). Using standardized test data, they found each of the three Title I schools participating in the study reported increases in student scores. Qualitative data collected through in-depth semi-structured interviews suggested that teachers had been challenged in their assumptions about who should participate in gifted education programs (Swanson, 2006).

The results were echoed in VanTassel-Baska and Brown’s (2007) study of nine models currently in use, including Renzulli’s Schoolwide Enrichment Model (SEM) and Stanley’s Talent Search model, in order to examine the efficacy of program and curriculum models used in the field of gifted education. Flexible grouping of students, professional development for teachers, the use of inquiry as an instructional strategy to encourage problem-solving and decision-making as well as addressing the affective needs of the learner through problem-based learning were best practices identified in the study (VanTassel-Baska & Brown, 2007). Ensuring that underrepresented students have opportunities to be exposed to the suggested best practices for nurturing and developing talent is imperative.

These best practices were consistent with what Rogers (2007) described as “lessons” (p. 382) on the education of the gifted in her best evidence synthesis of literature on gifted education from 1861 to 2007. In this examination of all published
research studies, essays, program descriptions and theories identified in her study, Rogers stated that the literature suggested five lessons that may be useful to educators. First, in their areas of interest and passion, gifted students need daily challenge. Second, they also need opportunities to work independently more than other learners. In addition, academically gifted students benefit from acceleration opportunities such as early entry to school or working in subject areas a year or more in advance of their age group. Further, ability grouping is beneficial in that it supports their need to learn with peers who are of similar ability. The final lesson Rogers identified was the need for differentiation of instruction that would impact content and process including pacing, review and practice. She asserted that incorporating these best practices are important to serving all gifted students:

The implications of these lessons are far reaching. Educators who wish to implement research-based “best practices” must reconsider many of their previously held perspectives and must commit in more than words to developing the “full potential” of all learners, including the gifted and talented. To provide for the different ways that gifted learners learn (consistent challenge, daily talent development, independent work, whole-to-part, fast paced, depth and complexity, limited drill and review), educators must reconsider whether (and how) they can manage increasingly heterogeneous and diverse classrooms. (Rogers, 2007, p. 391)

Pointing out that several different approaches to curriculum development for gifted students are recommended by various researchers in the field already including acceleration, enrichment, problem-based learning, and creativity-focused models,
Brighton (2001) suggested integrating complementary practices may be more beneficial to practitioners than seeking to develop yet another model for differentiation.

**Deliberate Practice**

Gladwell (2008) provided an oft-quoted numerical metric, suggesting it takes 10,000 hours of deliberate practice to achieve expert proficiency with little difference in life outcomes of people with IQs of 120 and those with much higher IQ scores such as 150. This focus on deliberate practice was consistent with Ericsson, Roring, and Nandagopal’s (2007) challenge to the concept of latent giftedness, and subsequent proffering of a focus on more observable achievements such as deliberate practice:

> We and other researchers (Zieglar, 2005) are critical of theories of giftedness expressed in terms of other latent capacities, such as intelligence, creativity and motivation, which have similarly been found difficult to measure and define in a consensually acceptable manner. The expert performance approach avoids the problems of latent capacities by capturing and analyzing the observed target performance of individuals, namely their reproducibly superior performance in the particular domains. In explaining this performance, it is possible to account for its acquisition by an analysis of the associated learning activities, such as deliberate practice. (Ericsson et al., 2007, p. 43-44)

Shavinina (2007), however, argued that cognitive-developmental theory of giftedness is necessary to address gaps left by the deliberate practice theory as it recognizes sensitive developmental periods and that, though important to performance, deliberate practice in itself does not automatically improve performance unless it leads to the development of a “unique cognitive experience” (Shavinina, 2007, p. 81).
MacNamara, Hambrick, and Oswald (2014), in a meta-analysis of studies in the domains of games, music, education, sports and professions, examined the relationship between expert performance and deliberate practice. The results of this and other studies suggested deliberate practice to be important, but that empirical studies suggested that other inherited factors such as working memory may have more impact than deliberate practice (Hambrick & Meinz, 2011; Macnamara et al., 2014).

**Cultural Competency**

Just as those seeking to identify potential solutions to underrepresentation must consider the talent domain in order to begin talent development program planning, they must also consider the impact of the students’ cultural experiences. While there are notable differences between students from different demographic groups, there can be great variation in the experiences of students from within demographic groups as well (Gentry, Fugate, Wu, & Castellano, 2014; Stambaugh & Chandler, 2012; C. Tomlinson & Jarvis, 2014). In a study of 100 educators from three different Native American nations, the Diné, Lakota, and Ojibwe, Gentry et al. (2014) provided an example of this potential for within-group variation. These educators represented sites with 95%–100% Native American student populations.

In response to the tendency for literature on talent development with Native American students to be generalized across several different Native American tribes, the groups were asked to review themes in the extant literature and identify what they considered to be accurate and to add “new culturally specific understandings that were not included among the literature-based assumptions” (Gentry et al., 2014, p. 101). The idea, for example, that recognition of giftedness and talent development was not
culturally compatible was one such assumption presented to the educators to consider. Another example was the assumption that teachers and parents did not encourage the expression of strong feelings or knowledge. While the Diné educators did not agree that this was the case, Lakota educators found this to be consistent with cultural norms for their nations (Gentry et al., 2014).

As was also the goal of the study, new understandings emerged. For example, educators from the Lakota Nation identified the need to help students bridge both college and career informational gaps and well as to bridge cultural gaps between Native American students and non-Native American teachers. The Ojibwe Nation members, on the other hand, stated their belief that cultural teaching must begin with the elders at home and did not accept that this should be part of the school’s mission. The Diné group stressed a need to focus on the students’ mathematical and verbal skill strengths in addition to the strengths associated with creativity often attributed to Native American students and most commonly noted in the literature such as naturalist, spiritual, artistic and musical strengths (Gentry et al., 2014). Decisions about which program models to use in a school district must be considered with the understanding that underrepresented students are not monolithic and even within demographic groups, differences must be considered.

For students underrepresented in gifted education, achievement is often linked to how effectively cultural connections are made. Kanu (2006) sought to determine the most effective ways to integrate native cultural knowledge into curriculum and instruction and to determine if such integration affected academic outcomes. In a study of 31 Native Canadian students taught by Anglo-Canadian teachers, students were divided into two
social studies classes. Students in one class received the integrated curriculum and instruction pedagogy. The students in the other class did not and their overall scores averaged 48% versus the 72% for students who did receive the curriculum and pedagogy.

The cultural background of the dominant group in the US informs the majority of curriculum and instructional practices (Ford et al., 2008). Differences in communication, learning, and behavior styles between CLD students and teachers are often the result of teachers’ lack of multicultural education. CLD students’ adjustment in school is often adversely affected by these misunderstandings (Ewing & Yong, 1992; Ford, 2011). To simultaneously provide minority students with multicultural curriculum as well as Bloom’s high order thinking skills, Ford and Harris (1999) recommended the implementation of the Bloom-Banks Matrix. In increasingly diverse schools, cultural competence of administrators and teachers is critical to providing the bridge between the students’ homes and the schools that can support high student achievement (Ford, 2010).

Resilience, family support, racial identities, grit, investment of time, and opportunity were identified by G. A. Davis, Rimm, and Siegle (2011) as factors important to achievement for low income and minority students. Thus, programs with strong parental involvement components are usually more effective with this population of students (J. Davis, 2010; Olszewski-Kubilius & Clarenbach, 2012, 2014). Flint (2010) pointed out “A family’s communication style, education level, parenting style, consistency of expectations and discipline, and organization within the home are just a few of the many factors that affect the success or failure of gifted children” (p. 5).
**Distance Education**

Gifted students’ needs are sometimes difficult to meet in the regular classroom. For students from underresourced schools this is especially difficult. Wallace (2005) suggested that opportunities might be presented by technology to increase possibilities for advancement, enrichment and acceleration. In a case study of the Johns Hopkins University’s Center for Talented Youth (CTY) distance education program, Wallace noted that since 1984 more than 6,000 students per year, representing more than 50 countries have taken courses through CTY from home (Wallace, 2005). However, she conceded the findings in the extant literature on the effectiveness of in-person versus distance education is varied including the effectiveness of distance education based on the students’ ages (Wallace, 2009).

VanTassel-Baska (2005) listed telecommunications as a tool for differentiation among what she described as “nonnegotiables” for gifted programs and services including acceleration. Although literature is available that examines the role of technology and distance education in persistence (Dahl, 2004), the academic impact of students’ relationships with their online advisors (Gravel, 2012), the impact of the digital divide (Norris & Conceição, 2004), and advocacy for low-income students (Stevenson, 2013), there is little research on distance education that has been conducted specifically with low-income, high-ability students. Transferable themes, however, may be identified in the literature about the difficulties and advantages of the use of technology in instruction and advising. In studies focusing on adult learners, some researchers noted the negative outcomes for low income, first generation college students as a result of online
advising and instruction (Bidwell, 2013). Others noted the benefits (Brunner, 2013; Norris & Conceição, 2004; Seay, 2006).

In an examination of the extant literature on K-12 distance education, Rice (2006) pointed out that what little research that forms the basis of K-12 distance education instructional program development has been conducted on adult education and corporate models. As a result, Rice (2006) argues that the limited research that has, in fact, been conducted on K-12 students lacks a theoretical framework: “One thing we do know is that the effectiveness of distance education appears to have more to do with who is teaching, who is learning and how that learning is accomplished, and less to do with the medium” (p. 440).

In a study of programs representing various delivery methods for using distance education in gifted education, Adams and Cross (1999) identified both benefits and challenges. With no Governor’s School “site” per se, the A. Linwood Holdton Governor’s School, for example, provided advanced courses via the Internet that allowed students to remain in their home schools. This design was due to the harsh winters and mountainous geography in Southwest Virginia.

Another program designed with consideration to geographic issues was the Massachusetts-based Regional Electronic Magnet School Re: Math and Science (REMS²). These concerns, however, were due to the locations of participants. Working with university and corporate scientists, math and science teachers along with two students from each school, were linked via access to their state’s electronic database in order to collaborate on authentic research culminating in a 2-week summer institute. Not only were students able to connect their studies to skills used in the real world by
scientists and mathematicians, they were able to do so exploring subjects that were of interest to them. Adams and Cross (1999) stated:

Students learned experimental design, laboratory skills, instrumentation, mathematical modeling, and data analysis, while engaged in specific scientific and mathematical topics of interest to them. Computer applications, careers in mathematics and science, communication skills, and ethics in scientific study and implementation were addressed. (para. 23)

The residential program of the Indiana Academy for Science, Mathematics, and Humanities used a very different model than those of the A. Linwood Holton Governor’s School and the REMS² program. It brought gifted students from all over Indiana to one location instead of providing instruction primarily though technology. Professional development, electronic field trips and exposure to advanced curriculum, however, are distance education opportunities available that are provided through the Indiana Academy.

Olszewski-Kubilius and Corwith (2010), while pointing out that distance education is not a recent development in the United States, noted that, as of 2010, through CTY at Johns Hopkins University, the Talent Identification Program at Duke University (Duke TIP), the Center for Talent Development (CTD) at Northwestern University, the Wisconsin Center for Academically Talented Youth (WCATY), and the Education Program for Gifted Youth (EPGY) at Stanford University alone, more than 34,644 gifted students in Grades 3–12 took courses via distance education. Suggesting that this proliferation of technology-based programs targeting gifted students emphasizes the need for research on the programs’ effectiveness, they also pointed out that this increase in
availability through technology of academically rigorous curricula raised issues around the need to address barriers to access for low-income, high ability students who may not have computers or internet services available at home that would allow them to benefit from distance education (Olszewski-Kubilius & Corwith, 2010).

Exemplar Programs and Models

Exemplar programs and models may provide templates for students to be successfully identified within the parameters that currently exist. Ebanks, Toldson, Richards, and Lemmons’ (2012) research suggests that additional preparation prior to the selection process may be what is needed for low income, minority and other underrepresented students to be equipped to compete on a level playing field during the process of identification for participation in academically rigorous programs. Arguing that enrichment program planning should be framed in light of students’ socioeconomic status (SES), Ebanks and colleagues (2012) recommended free intensive test preparation programs be a part of program design for low-income students. They described a pilot study of a test preparation program developed to prepare Black and Latino middle school students to take the admissions test required to be eligible to attend one of the special schools in New York city that typically had very low populations of Black and Latino students.

Fifty-nine sixth grade students were identified based on their English Language Arts and Math Grade 5 statewide tests scores. Of the 59 students, 55 were Black, 2 were Latino, and 2 were other. Participants received mentoring experiences, academic course work between 7th and 10th grade levels, and mock placement tests. Of the 47 who completed the program, 30% received a passing score on the placement test with 27%
accepted into one of the specialized high schools. The rest of the participants were accepted into one of the city’s other highly competitive public high schools (Ebanks et al., 2012).

Adams and Chandler (2014) describe a variety of potentially replicable program models and funding strategies that have been effective in supporting students underrepresented in gifted education programs. One such program is Northwestern University’s Project EXCITE. This program is funded by local school districts in collaboration with the Center for Talent Development (CTD) and, like the program described by Ebanks and his colleagues (2012), the goal of this program was to equip students to be successful on placement tests that determine citywide academic program placements. Through parental outreach and the cultivation of peer support initiatives, educators seek to increase the number of students from underrepresented groups in advanced courses in high school and ultimately in the college pipeline (Adams & Chandler, 2014).

Jacob K. Javits Gifted and Talented Student Education Program (Javits Act) provided federal funding for the development of several effective models, curricula and practices that have been more effective in the identification of underrepresented students. The Javits Act also funded the National Research Center on the Gifted and Talented and provided teacher professional development (Winkler & Jolly, 2011). These programs targeted students from both rural and urban areas.

Project Clustering Learners Unlocks Equity (Project CLUE), for example, joined university researchers and public school teachers from the urban center of Indianapolis, Indiana. University staff trained teachers in how to recognize gifted characteristics in
students who were from non-dominant cultures. As a result, after the first year data indicated representation among Latino and other English Language Learners (ELL) in the gifted program increased (R. L. Pierce et al., 2006).

Project Rural Education for Accelerated Learners (REAL) was another Javits program that targeted rural students. With a slight majority of Pennsylvania’s schools being rural (58%), it was important that issues specific to students from rural communities be addressed. While Javits funds allowed for the professional development for teachers on identification in these communities as well, it also provided resources to enhance instruction and college access through apprenticeships, video and web-based instruction, and educational counseling. Also central to Project REAL was the development of a center for gifted students at Indiana University of Pennsylvania (IUP) (Winkler & Jolly, 2011).

Summary

The literature reviewed in this section suggests potential solutions to underrepresentation of African American, Latino, Native American, ELL students and low-income students in gifted education programs. It also suggests strategies for nurturing abilities. Principle strategies identified include but are not limited to multiple identification criteria for participation in gifted education programs, attention to the affective environment in the school and classrooms, domain specific talent development, and cultural competency of teachers and administrators. Researchers are also seeking to identify and replicate effective program models that are research-based. The degree by which students from populations underrepresented in gifted education programs benefit
from research-based models and strategies may be determined by how school boards define and use research to inform policy and practice.

**Practical Implications of School District Policymaking: School Board Decision-making**

Researchers are interested in the impact of education policy on school level practice as education reform is considered. What the results of empirical research suggest as most effective in practice should inform policymaking (Cohen & Ball, 1990; Cohen, Moffitt, & Goldin, 2007). Previous studies of the Academic Potential Project from the district that is the anticipated setting for this study indicate the Project meets the criteria outlined in the literature for research-based strategies and best practices to address the issue of underrepresentation in its gifted education program. None of the studies of the district’s model, however, have examined the political factors affecting its development from the perspective of board members, administrators, teachers and counselors. Literature on the impact of the local school board decision-making on African American, Latino, Native American, ELL and low-income students will be examined in this section. In particular, this section will explore what is considered to be and what influences “research-based” decision-making by local school boards.

Lubienski, Scott, and DeBray (2014) suggested that education policy may be on the same continuum of evidence-demand as climate policy in that each has unclear causal relationships, costs to individuals are more clear than benefits, substantial resources are at stake and there are multiple producers of research evidence, including trade associations, think tanks, advocacy groups, labor unions and universities. Pointing out that in an era where policymakers are calling for educational strategies that are research-based, the rise
of organizations, both public and private, designed to interpret the research for policymakers may actually bias educational policymaking, rather than provide clarifying support (Lubienski et al., 2014; Stover, 2007). Lubienski and colleagues (2014) stated, “in these types of policy sectors where there are both real demands for empirical evidence of effectiveness and widespread consumption of nonempirical ‘evidence,’ the use of research evidence may be more susceptible to politicization” (p. 135). High ability students from historically disenfranchised communities often attend schools disproportionately impacted by negative outcomes of education policy actions that are described as based on research evidence (Kozol, 1991, 2006; Nelson & Jones, 2007).

Asen, Gurke, Conners, Solomon, and Gumm (2013) examined how three Wisconsin school districts Beloit, West Bend, and Elmbrook used research in their policymaking processes. Over a one-year period, researchers attended 160 school board and committee meetings. This resulted in 260.5 hours of data. Determinations of what portions of these meetings were to be transcribed were based on three factors. First, policy items had to be discussed. Thus, meetings focusing on discipline issues, purchasing or the like were not attended. Second, background sessions and informational meetings were excluded. Only those that were deliberative with participants stating positions of opposition or support of a specific policy were included. Third, deliberations that were connected to future action by the board were transcribed. They sought to identify evidence used in the decisions affecting policymaking. Research, experience, testimony, data, example, and law/policy emerged as the types of evidence used to support decisions with research being among the most infrequent. Noting that who the advocate was, the audience and the context determined if and what research was cited in
the meetings and how, for Elmbrook, occurrences of research as evidence were most infrequent of all with only 23 total occurrences compared to 50 in Beloit and 40 in West Bend. Asen and colleagues (2013) attributed this to the highly structured task-oriented nature of Elmbrook’s meeting, which did not lend itself to exploratory discussions, and Elmbrook’s effectiveness in Wisconsin’s data-driven climate.

In a study of a 7-member school board in a Virginia school district with a population of 36,000, Crum and Hellman (2009), using a decision-making framework that categorized operational criteria based on the comments of school board members, found that school boards often do not know if the problems presented to them fit NCLB requirements since boards depend on school district staff to identify issues needing action and that are relevant to the district’s needs. They found:

Staff presented the majority of the problems in the areas of finance, facility, curriculum, miscellaneous, and policy, whereas the board presented the majority of the problems in the personnel and student concerns areas. The overwhelming majority of the problems were introduced to the board in writing, thereby indicating the board was aware of most of the decision-needing situations prior to the meetings. (p. 21)

This outcome was consistent with McAdams’s (2012) description of the policymaking process as not central to the work of board members, with most major district initiatives not resulting from board policymaking but superintendent executive orders approved by the board through votes or resolutions. In a review of over 100 school district policy manuals, McAdams (2012) concluded that most boards focus on management rather than policymaking and the number of reform policies in most of the manuals reviewed
confirms this.

Board members are pulled into management because management decisions often attract public attention or because of the pressure from special interests. Solving problems is a satisfying exercise of power. Intervening to help get rid of an unpopular principal, place a friend in a job, obtain a contract for a powerful vendor or solve a transportation dispute -- in the reasoning of a school board member -- makes someone happy, makes the district better, makes me feel like I am making a difference and, incidentally, contributes to my re-election. (para. 4)

Stover (2007) argued that the difficulty that educators and policymakers have discerning what is credible research might be linked to the reality that what is considered the best “research” is often determined by who has the best marketers. Pointing out that with the Internet, think tanks and advocacy groups, research is more accessible than when it was primarily disseminated through scholarly journals. This makes it necessary, however, for consumers, including school board members and other policymakers, to be more discriminating (Stover, 2007). The impact of policies that seek to address change and that will affect children over time make it particularly important that school boards use research judiciously. In a comparison case study of two medium-sized Wisconsin districts that had experienced large demographic shifts within a relatively short period of time, E. O. Turner (2015) explored the district level policy responses to demographic change. The demographic shifts included larger numbers of non-White students, of students from poverty, and students from immigrant families in each of the districts. E. O. Turner described a “cultural deficit discourse” as woven throughout the district leaders’ meaning-making and consequential school board policymaking (p. 29).
Drawing primarily on data collected through interviews with 37 former and current district-level policymakers, E. O. Turner (2015) found that in both districts, while policymakers expressed commitments to serving students from poverty, and students from immigrant, African American, Latino and other non-White families, they approached how they made sense of the students’ challenges from either a colorblind or color mute perspectives. That is, they acknowledged the racial differences, but did not acknowledge racial inequality as the possible reason for the challenges the students faced, but framed the students’ experience in the district in light of individual or cultural choices. Museus, Yee, and Lambe (2011) described colorblindness as the suggestion that race and racism do not significantly influence people’s experiences (Museus et al., 2011). Jung-ah (2008) described colorblind ideology as a new kind of racism in that it is a response to the discomfort many White people feel if required to face their White privilege. He further described it as a bid for innocence and racial irresponsibility (Jung-ah, 2008). From this perspective, issues affecting students underrepresented in gifted education programs are not as likely to be addressed through the lens of equity, but of equality. Thus, there is little to no acknowledgement of the uneven playing field traversed by students who are not members of more affluent White communities, and little will to provide the recommended identification practices, instructional pedagogies, or professional development needed to meaningfully address underrepresentation in gifted education programs.

**Setting and History of the Suburban District Academic Potential Project Model**

The history of the target district’s policymaking process that was the impetus for the Academic Potential Project is part of the larger historical context, which informs this
study. Ten years after *Brown v. Board of Education* and seven years after the launch of Sputnik, 1964 was an important year for The Suburban District. It marked the end of 10 years of implementation of the Commonwealth of Virginia’s policy of Massive Resistance. This group of laws, passed in 1958, was intended to prevent integration of the schools; however, Title VI of the Civil Rights Act of 1964, and the Elementary and Secondary Education Act of 1965 denied federal funds to schools determined to persist in resisting integration. This effectively ended the Massive Resistance policy and opened the Suburban District to school choice. School choice meant students were no longer limited by race in what schools they chose to attend.

Sputnik represented the beginning of the space race between the US and the Soviet Union (Jolly, 2009; Roberts, 1999; Robins & Jolly, 2013; Stewart, 1999). This led to an increased focus on mathematics and science education in the United States. District documents indicate that with funding from the Department of Defense, the Suburban School District opened its first center for students with high academic potential as determined by a minimum score of 140 on either the Stanford-Binet Intelligence Scale or the Wechsler Intelligence Scale for Children. These students were placed in one of two self-contained classrooms available in the district. The program grew exponentially in the first ten years of existence and by 1974 there were school-based programs in every elementary school available for students who scored between 120 and 139 on group administered tests such as Cognitive Abilities Test and the Otis Lennon School Ability Test. Due to concern about the underrepresentation of students from diverse ethnic backgrounds in the gifted education program, a Gifted Center Identification Committee was appointed in 1989 tasked with examining placement practices and providing
recommendations of changes that could result in a more diversity in the gifted education program. Among recommended changes was that placement in the center programs not be based solely on the one score, but that scores on the CogAT and Otis Lennon as well as other criteria such as student progress reports, achievement test scores, and a score on a Gifted Behavior Rating Scale to be developed by committee be included to determine eligibility.

In 2001, district documents indicated the Naglieri Nonverbal Ability Test, a complex series of geometric shapes and designs which requires higher level problem-solving skills, was incorporated into the screening and identification process in order to address the needs of students who, due to English language skills or other cultural considerations, may not do well on traditional intelligence measurement instruments. This was the year the Academic Potential Project began. Beginning with the youngest learners, the goal of the model is to identify giftedness in diverse students as soon as possible and to support their development so that they are equipped for increasingly greater academic challenges. Based on national exemplar models, foundational to this model is the notion of casting a wide net to include, not exclude, in order to develop potential (Adams & Chandler, 2014; Olszewski-Kubilius & Clarenbach, 2012).

**Conclusion**

In conclusion, this literature review establishes the foundation for framing this study. With its examination of the issue of the impact of policy on practice, it provides a comprehensive overview of the factors contributing to the underrepresentation of African American, Latino, English Language learners, and low income students in gifted education programs throughout the American educational system; as well as, potential
solutions as identified by researchers and practitioners. The policy historiography of the district detailed in this present study will have implications for other local communities concerned with closing opportunity gaps that impact the college pipeline for America’s students.
CHAPTER 3

METHOD

Whether consciously or unconsciously, people’s educational policy perspectives are informed by the history of past policy reforms and initiatives (Schneider & Ingram, 1993; Tyack, 1991). Although there is a consensus among researchers that there are populations of students consistently underrepresented in gifted education programs, there is a dearth of research on program models that may be effectively bridging this opportunity gap. To provide sound models for systemic change, examination of the interplay between policy and practice in one district that has accepted the challenge to address the issue of underrepresentation of low income, African American, Latino and other English Language Learners (ELL) in gifted education may be useful.

This present study of what will be referred to, for the purposes of this study, as the Academic Potential Project in the Suburban District, includes a review of the scholarly and institutional literature concerning identification and talent development of students typically underrepresented in gifted education and more broadly, the educational reform issues that form the policy context within which The Academic Potential Project has grown; the collection and analysis of descriptive data from secondary sources, resulting
in the creation of an historical context for answering the research questions of this study; and a review of selected archival documents and an analysis of the results of interviews, which provide the data for answering the research questions. Specifically, this study addresses the following two questions:

1. How, if at all, did the nature of federal, state and local policies, and their associated mandates to change practice, impact the underrepresentation of African American, Native American, Latino and/or low income students in gifted education programs within the context of one diverse school district?

2. What relationships or historical events, if any, did stakeholders perceive to be most influential on changes in policy and practice to the original gifted education mandate in Suburban District?

**Research Design**

The research design chosen for this study represents a historical case study that focuses on one particular school district over time, tracing policy and program development designed to address issues of equity in the gifted education program. As is the case with historical research, the goal of this study is to systematically collect and evaluate data in order to communicate past events or describe past conditions surrounding the development and implementation of the Suburban District’s Academic Potential Project (Fraenkel & Wallen, 2006). As is true of case study research, the goal of this study is to attempt to answer “how” and/or “why” questions. Both case study and historical methods are descriptive (Yin, 2003). Empirical inquiry as carried out in a historical case study is not quantifiable. In an educational setting, for example, empiricity is substantiated through the review of documents, records of statements at the public
meetings, and practices put in place in the classrooms. The goal, then, is to characterize the reality. Merriam (2001) stated:

In applied fields such as education, historical case studies have tended to be descriptions of institutions, programs, and practices as they have evolved in time. Historical case studies may involve more than a chronological history of an event, however. To understand an event and apply that knowledge to present practice means knowing the context of the event, the assumptions behind it, and perhaps the event’s impact on the institution or participants. (p. 34)

Since the development and implementation of the Academic Potential Project is a relatively recent historical event and most of the participants and witnesses are still living, this study does not adhere to a strict historical design, but as a historical case study includes some elements of both case study and historiography.

**Case Study Research**

Case study is a method used in research to study a phenomenon occurring in a bounded context in real life. Case study, a form of empirical inquiry that uses multiple sources of information, should provide a clear, in-depth analysis of contemporary events in which the object of study and the context of the object are not easily separated (Creswell, 2013; Merriam, 2009; Stake, 1995; Thomas, 2011; Yin, 2009). It is not quantifiable. In case study, the goal is to characterize the reality. Most case studies are either situated in a social constructivist paradigm (Merriam, 2009; Stake, 1995) or are from a post-positivist standpoint (Flyvbjerg, 2011; Yin, 2012). Social constructivists share assumptions around knowledge as a culturally and historically specific construct developed through social interactions (Burr, 2003). Post-positivists, however, ascribe
patterns and causal relationships to the social world and assert these patterns and relationships can be discovered and tested (Ryan, 2006).

**Historiographical Methods**

Using elements of policy historiography, this research was approached with the understanding that researchers using historiographical methods do not examine past events within a vacuum, but in context, often relying on documentary and statistical evidence (Gale, 2001). Kincheloe (1991) historiographies of education might vary, but share the common goal of examining “the processes of educational change and to expose the possible relationships between the socio-educational present and the socio-educational past” (p. 234).

**Participants**

Criterion sampling procedures were used to recruit the participants from whom data was collected for this study (Moustakas, 1994). Criteria for participation required that participants could be considered stakeholders in the policy and practice of the Suburban District Gifted Program during the period of 2001–2015 as teachers, administrators or policymakers involved in the development or implementation of the Academic Potential Project. Participant numbers and titles based on work-related roles were used to protect the identities of the participants.

After obtaining research ethics approval and access through the district’s research proposal approval process, the district’s Gifted Education Coordinator was contacted to request an interview and support in generating a criterion-based snowball sample of participants in the policy and practice of the Suburban District’s Gifted Education program from 2001–2015. The coordinator, through email contact, forwarded The
Institutional Review Board (IRB)-approved study description, and informed consent forms were emailed to all gifted program staff and Academic Potential Project principals. Willing participants replied forwarding signed consent forms, their e-mail and telephone contact details. Positive responses were followed up by e-mail with a scheduling chart to arrange a convenient time for the interview. All interviews were conducted by telephone at times convenient for the participants, informed consent was obtained verbally at the beginning of each call, and all participants consented to have their interview recorded. Each interview began with a request for an overview of the participant’s history with and current role in the Academic Potential Project. Interviews were digitally recorded, transcribed verbatim, and verified by participants for accuracy. Transcribed documents were analyzed using constant comparative analysis, which involves organizing data into meaningful categories, themes, and interpreting meanings so that the study’s results can provide meaning to others (Creswell, 2013; Taylor & Gibbs, 2010).

A total of 14 educators agreed to participate in one-on-one, semi-structured interviews. This group consisted of 13 females and 1 male. Five gifted resource teachers, four principals, one assistant principal, two elementary gifted educational specialists, one secondary gifted educational specialist, and one district gifted education coordinator participated in the semi-structured interviews (see Appendix E, Interview Participants).

Data Collection

Primary methods that used to collect data for this study were document review and semi-structured interviews.
Document Review

The study included document review as part of the data collection process. This included the examination of artifacts such as policy statements, minutes from school board meetings or other documentation of historical events regarding the Academic Potential Project. Because systematic examination of relevant documents has been identified as key to historical case studies, Lincoln and Guba (1985) described documents as "any written or recorded material not prepared for the purpose of research or at the request of the inquirer" (p. 11). This definition includes any physical evidence, written or recorded communication created and accessible prior to the beginning of the current research study (Merriam, 1998). All data included were that which had been collected by others, including records of statistical evidence found in databases about student learning outcomes. Fraenkel and Wallen (2006) stressed the importance of distinguishing between primary and secondary sources. They described a primary source as “one prepared by an individual who was a participant in or a direct witness to the event being described,” while they viewed a secondary source as “a document prepared by an individual who was not a direct witness to the event but obtained his or her description from someone else” (p. 548).

With the guidance of those selected through purposive sampling of stakeholders or from the document review, archival data relevant to my topic was chosen. In building this collection, an ongoing search was conducted for all available official historical documents relating to the Suburban District’s Gifted Program, in general, and the Suburban District’s Advanced Potential project, in particular. Published and unpublished documents were considered. The system of organization used to compile the chronology
was both time and content related. Archival data and public records associated with the Suburban District Advanced Potential project were collected, catalogued, and analyzed. G. A. Bowen (2009) described document analysis as an iterative process that includes superficial examination (skimming), thorough examination (reading) and interpretation to combine elements of both content and thematic analyses. Through content analysis, information is categorized as it relates to the research questions. Through thematic analysis, emerging themes were identified through pattern recognition (G. A. Bowen, 2009). In order to effectively collect and review pertinent documents for my document review, a systematic data mining process was established to locate relevant sources of information, and distinguish them as primary or secondary. A request was made for the Suburban District’s Gifted Education Program files related to the Academic Potential Project’s initiatives and any other documents deemed relevant to the study. The documents reviewed formed the basis for understanding the historical context for evaluating the impact of policies and determining who should be interviewed (see Appendix F).

In addition to notetaking and journaling, an archival data log was kept noting the sources of data, the dates of data collection, and the rationales for collecting particular data (Bowen, 2009; Creswell, 2013).

**Semi-structured Interviews**

Because there is value in the creation of data based on the lived experiences of those involved, another source of data collected using semi-structured in-depth interviews (Fraenkel & Wallen, 2006; Weis & Fine, 2000). This study privileges description and characterization with the understanding that the impact shows up in what is expressed,
but also sometimes even in evasive responses. The philosophical underpinning in the development of questions for these interviews was informed by the requirements inherent in phenomenological interviews. Phenomenological interviews require that the researcher exercises care in the development of questions that are clear and not leading or suggestive of the content that the researcher hopes to confirm (van Manen, 2011). These private interviews took place at the convenience of the person serving as the data source and although all participants were offered the option of telephone, visual telecommunications tools or in person interviews in mutually agreed-upon locations, all chose to be interviewed by telephone. Most interviews lasted between approximately 45-90 minutes.

A phenomenological study explores the common meanings that individuals hold in relation to a particular phenomenon (Creswell, 2013). Phenomenology focuses on the essence or structure of an experience, and attempts to deal with inner experiences that may be unprobed in everyday life (Moustakas, 1994; Taylor & Gibbs, 2010). This approach was chosen with the hope of examining stakeholders’ perceptions, experiences, beliefs regarding the development and implementation of the Suburban District’s Academic Potential Project. Using these various historical documents, and criterion-based snowball sampling, participants were identified who were interviewed using questions developed to facilitate the discussion (Appendix G).

All interviews were recorded and transcribed. After the interview, participants were provided with a written summary of their interview and given the opportunity to review, correct, and/or clarify their responses. Through this member checking, participants had the opportunity to determine if they considered the data, analysis, interpretations and conclusions to be credible (Creswell, 2013). After participants made
corrections or clarifications that they felt were necessary, the data was analyzed using the procedures described below.

**Data Analysis**

Data collected in the study were analyzed within a broad framework that describes the role played by stakeholders in the policy formulation, adoption and implementation of the Academic Potential Project. There are several ways one can analyze case studies that were considered for use in this study, including pattern matching, explanation building and time-series analysis. Researchers who seek to identify patterns that support their hypotheses use pattern-matching. Tellis (1997) described explanation building as “an iterative process that begins with a theoretical statement, refines it, revises the proposition, and repeating this process from the beginning” (para. 54). It is also considered to be a type of pattern matching and is used most often in exploratory and explanatory case studies (Tellis, 1997). Yin (2014) stated:

> the essential logic underlying a time-series design is the match between the observed (empirical) trend and either of the following: (a) a theoretically significant trend specified before the onset of the investigation or (b) some rival trend, also specified earlier” (p. 145).

Because one of the goals of this study was to provide a chronological history of the policy process in the development of the Academic Potential Project, time-series analysis was anticipated to be the most effective strategy to use in this case study because it provides the ability to trace changes over time. Consistent with the rules of this strategy, prior to collecting data, the specific time frame to be considered was identified, the aspects of the policymaking process to be traced over time, and what are believed to be
the relationships between and among events from which a timeline was developed.

Semi-structured interview data was analyzed using a hermeneutical type of phenomenology primarily, in that it is interpretive rather than purely descriptive (Creswell, 2013; Moustakas, 1994). Moustakas (1994) described goals of hermeneutical interpretation as gaining a fuller understanding of the participants’ points of view through the reading and interpretation of participants’ statements, as well as ascertaining the social and cultural forces that may influence their points of view. He further described hermeneutic phenomenology as the acknowledgement of the interrelationships in “the direct conscious description of experience and the underlying dynamic or structure that accounts for the experience” (p. 9). By identifying common themes as they emerge and providing a composite description of multiple experiences from the different participants’ perspectives, the implication is that these understandings can be made available for a larger whole. Therefore, interviews were not evaluated on percentage of responses, as would be the case with quantitative interview responses based on close-ended questions. The goal was to get an understanding of characteristics of the past and current experiences. Mine is to be an interpretive answer, not a quantitative calculation.

Data analysis was accomplished in a twofold manner. Both the document review and interview data were used to develop a timeline for the creation and development of the Suburban District’s Gifted Education Program and, in particular, its Academic Potential Project comparable to the qualitative concept of data triangulation as described by Creswell (2013) as: “When qualitative researchers locate evidence to document a code or theme in different sources of data, they are triangulating information and providing validity to their findings” (p. 251). A chronology is important to this study because it
details political events, the Suburban District’s school board decisions, curriculum and assessment changes and other information that affected the development of the Academic Potential Project. Also, it serves as a collective memory review document, not only for study participants, but also for others seeking to form a historical analysis of the policy and practice of the program. A results chart was used to surface the study’s results as data was analyzed in a cyclical and recursive manner. In addition to reflecting patterns, themes, groups, and theme-related literature references, the results chart was adapted to include Gallagher’s (2015) levels of educational policymaking affecting gifted education. The table includes the data collection strategy anticipated to answer research questions, as modeled in Bland et al. (2013) (see Appendix H). Common patterns within and across data were grouped to identify common themes. The relationship of themes to empirical and theoretical literature as well as to each other was then reported as results.

**Interview Data**

Transcriptions of interview data were entered into the qualitative data analysis software package NVivo© Version 11.4.0 released February 2017 where they were coded for thematic analysis (Creswell, 2013). Data analysis began by identifying participants’ statements that relate to the research focus and separating information relevant to my area of study from irrelevant information. Relevant information was further analyzed in small segments that each reflected a single, specific thought. Segments were grouped into categories (codes) that reflected the various aspects of the phenomenon as the participants experienced it. With consideration of the various ways in which different people experienced the phenomenon, from the various meanings identified, descriptions were
developed of the experience of policy and practice in the Academic Potential Project as my participants have experienced it.

NVivo© Version 11.4.0 allows researchers to code, sort and categorize qualitative data. Transcribed phenomenological interview data were examined and coded based on the ideas, themes, and novel quotes emanating from the text. NVivo groups all text identified on specific code onto a single document. It also allows the researcher to create subfolders of codes while examining the data. However, the focus from one participant to another was often quite different. I was able to highlight sections of data and create what is referred in in NVivo as a “node” which is what allows the researcher to group material and identify emerging patterns, ideas and themes.

For example, the idea of “changing mindsets” was mentioned by several participants. However, one participant mentioned changing mindsets in terms of supporting students. Another mentioned it in terms of the Community in general. Several participants mentioned it in terms of impacting the thinking of parents of Whitestudents from high socio-economic backgrounds. Others mentioned it in terms of their peers who were general education teachers. Some mentioned it in terms of parents of Academic Potential Project students. “Mindset” was also grouped under the larger theme, “Challenges.”

NVivo allowed me to group the quotes and query the text in various ways including to examine data using word frequencies, or to compare nodes by number of coding references. Also, it provided several means by which data could be graphically represented for export and analysis such as fans, tables, and charts. During the open coding process, 62 individual codes were identified. Of that number, 20 node hierarchies
were created (See Appendix I). Finally, from those hierarchies three themes emerged to be reported as Findings in Chapter 4.

In this way, reflective and empirical inquiry models, which are both key to phenomenological research, were used. Data generated in this study were analyzed using constant comparative analysis, which involves organizing data into meaningful categories, themes, and interpreting meanings so that the study’s results can provide meaning to others (Creswell, 2013; Taylor & Gibbs, 2010).

**Document Review**

Once primary and secondary data sources were identified, a coding process and matrix to identify and organize developing categories was devised to distinguish what question the document may answer and whether it was a primary or secondary source. Reviewed documents were compared to interview transcript data and allowed this researcher to ascertain areas of convergence or divergence in the participants’ perceptions of their experiences in working with the Suburban District’s Academic Potential Project. According to Merriam (1998), “the right way to analyze data in a qualitative study is to do it simultaneously with data collection...Data that have been analyzed while being collected are both parsimonious and illuminating” (p. 162).

The constant comparative methods that were used are more consistent with grounded theory research approaches, which Creswell (2013) argued differ from phenomenology in that “phenomenology emphasizes the common experiences of a number of individuals, the intent of a grounded theory study is to move beyond description and to generate or discover a theory” (p. 83). When the responses and examples provided by the participants did not result in new themes emerging, thematic
saturation was reached, which is the understanding that when no new themes emerge from data analysis, data generation is complete (Creswell, 2013).

**Quality and Rigor**

Creswell (2013) suggested that the first step to establishing rigor is to ensure that the research design fits the research issues, purpose, and questions. He also suggested that at least three of nine key strategies identified for establishing rigor be used. To further ensure academic rigor, the participants selected for interviews had a direct experience with the phenomenon being studied. In this historical case study, triangulation of data types also was used by viewing artifacts, in addition to conducting interviews with each of the participants. In addition, rich, thick descriptions were used with sufficient detail to assist readers in making decisions about the transferability of the results to other, similar contexts (Birzer, 2013; Creswell, 2013). In qualitative research, transferability is the extent to which results can be applied to other contexts. Cohen and Crabtree (2006) described the connection between thick descriptions and transferability as key to external validity (Cohen & Crabtree, 2006).

Finally, qualitative researchers understand that as human beings, researchers will have biases and experiences that will inform how they look at the world. In naturalistic studies, the Researcher-as-Instrument statement is the tool in which these life experiences related to the study are outlined in order to provide the reader with a sense of any biases that may influence how the study was designed and analyzed. In addition, through the maintaining of a reflexive journal, a comprehensive record of methodological possibilities was maintained to note decisions and actions taken, questions and concerns that may arise and any reactions or relevant ideas or emerging patterns from data analysis.
(Lincoln & Guba, 1985). The results of this study were written up into a report to be discussed in Chapter 4. The most prominent themes that emerge from the analysis of evidence that most convincingly answer my research questions are discussed as findings.

This research is important because of its potential to affect the political process, policy implementation and systemic change in the education of students, in general, and high ability students from African American, Latino, Native American, and/or low-income groups specifically. Because current educational practices are thought to be influenced by the past, better understandings of beliefs and circumstances that may have encouraged or inhibited change may impact present educational decisions and actions. Such scholarship can potentially make theoretical and practice-related contributions to the politics of education, educational policy analysis, educational leadership, qualitative methods, and university-school-community partnership literatures, and other issues of the educational pipeline. This study can provide insight into how district level policymakers, administrators and other stakeholders conceptualize and act upon their understandings of social justice. It may also allow those with both formal and informal leadership roles in other districts to better understand their own leaders and determine how they may influence the development of strategies for maximum and more immediate benefits to high ability students typically underrepresented in gifted education programs. I anticipate disseminating results through future publications and conference presentations.
CHAPTER 4

FINDINGS

The purpose of this historical case study, with incorporated elements from policy historiography, was to examine policy and practice in one school district making efforts to alleviate underrepresentation of African American, Native American, Latino and/or low-income students in its gifted education program. The primary research questions were:

1. How, if at all, did the nature of federal, state and local policies, and their associated mandates to change practice, impact the underrepresentation of African American, Native American, Latino and/or low income students in gifted education programs within the context of one diverse school district?

2. What relationships or historical events, if any, did stakeholders perceive to be most influential on changes in policy and practice to the original gifted education mandate in Suburban District?

In this chapter, findings are discussed by data source. First a chronology of both internal and external factors informing the history of the Suburban District’s Academic Potential Project is presented. Second, findings from the semi-structured interviews are presented
by category. Third, findings from a data matrix are presented with a listing of stronger areas of connectivity. The chronology of events detailed in this chapter established the foundation for this inquiry by documenting significant national, state (see Appendix J) and local policies and historic events (see Appendix K). This chronology was derived from a document analysis of primary and secondary sources, as well as an examination of federal and state policies considered to be important to the recent history of and practice of gifted education in the Suburban District. Where relevant, oral accounts were included to support the data gathered through document review. This analysis is a decade-by-decade summary of events. The second section explores stakeholders’ perceptions of the impact that the policies and the district’s response had on the problem of underrepresentation in its gifted education program. These results are presented by categories, which are: Leadership, Impact of Policies, and Challenges and Hopes.

**Significant Historical Events and Education Policy and Narrative Chronology of the Academic Potential Project in the Suburban District**

Elements of the methods of policy historiography and historical case study were used to develop a social construction of the Academic Potential Project in the Suburban District described in this narrative chronology. In it, one will find descriptions of external and internal mandates that lead to changes in practice in gifted education nationally and in the Suburban District and the development of the Academic Potential Project. This chronology will help to provide context for the perceptions of the participants to be presented later in Chapter 4. It may be argued that a historical analysis of this period would identify the development of foundational research, theories and practices in the field of gifted education, as well as the founding of significant gifted education and
advocacy organizations (Robins, 2010). However, in keeping with the policy-related questions guiding this study, and the parameters required by the method chosen, documents reviewed not deemed to impact policy or practice in the specific context outlined in this study, that were dated after 2015 or that did not allow for verification of the date created, were not included in this chronology.

1950s The National Science Foundation, Desegregation and Sputnik

In the 1950s, three important sets of legislation occurred that would impact both the education of students who were African American, Latino and other minorities in the United States, and the education of students with high academic ability. The founding of the National Science Foundation in 1950 is cited as the beginning of federal gifted education policy in the United States. Through this legislation, funding was set aside for research and support of mathematics and science education. Near the midpoint of the decade, in 1954 in the landmark case, Brown v. the Board of Education (1954), the Supreme Court struck down Plessy v. Ferguson (1896), and the term "separate but equal" was determined to be unconstitutional (Ferguson & Mehta, 2004). Through Brown v. the Board of Education, the Supreme Court, determining that segregation denied African American and other non-White students equal educational opportunities, sought to address the achievement of all the nation’s students. It was the Soviet Union’s launch of Sputnik in 1958, however, that led to the declaration of a national educational emergency resulting in the enactment of the National Defense Education Act (P.L. 85-864), which allocated funds to develop students’ potential in mathematics, science and foreign languages.
The impact of Sputnik and the federal court decision were overshadowed by Virginia’s own laws developed as a part of a larger Southern strategy. In 1956, Virginia’s U.S. Senator, Harry Byrd, Sr. was a leader in the charge for what came to be known as Massive Resistance, a group of laws passed intended to prevent integration. These laws mandated that any public school that attempted to integrate would have its funds cut and would be closed. Virginia changed legislation requiring compulsory attendance and gave the authority to local school districts. In addition, the Virginia legislature determined that students could be permitted to attend schools outside of their districts and public funds could be used to pay tuition at private and parochial schools (Virginia Department of Education, 2017; Virginia Historical Society Collections and Resources, n.d.).

1960s The End of Massive Resistance and the Beginning of the Gifted Education in the Suburban District

Ten years after Brown v. Board of Education and seven years after the launch of Sputnik, 1964 was an important year for The Suburban District. It marked the end of 10 years of implementation of the Commonwealth of Virginia’s policy of Massive Resistance. This group of laws, passed in 1958, was intended to prevent integration of the schools; however, Title VI of the Civil Rights Act of 1964, and the Elementary and Secondary Education Act (ESEA) of 1965, signed by President Lyndon B. Johnson, denied federal funds to schools determined to persist in resisting integration. This effectively ended the Massive Resistance policy and opened the Suburban District to school choice. School choice meant students were no longer limited by race in what schools they could to attend.
When the federal government began to provide funding for gifted education through PL 85-864, the Suburban District, like many others nationwide, began to establish programs for youth with high academic abilities. Its first center opened in 1964. Initially, students in grades three through eight identified for participation were required to score 140 and above on either the Stanford-Binet Intelligence Scale or the Wechsler Intelligence Scale for Children. Program participants were referred to as “Superior Learners” and taught in one of the self-contained classrooms located at two elementary schools. Transportation was provided.

A year later, the Elementary and Secondary Education Act (P.L. 89-10) passed in Congress; and Title III and V allowed for the development of model gifted education programs and state-level gifted education personnel. In 1968, President Johnson established a White House Task Force on the Gifted. A 50-state survey was created, but no report was ever released. Both houses of Congress introduced federal bills to support states in the expansion of gifted education programs. Also, they sought to establish a federal definition of “gifted,” and included a directive to the U.S. Commission of Education to conduct a study on the needs of gifted children (Gallagher, 2015).

1970s The Marland Report and a Definition of “Gifted”

After the 1960s, efforts to strengthen gifted education in the United States continued into the next decade. In 1970, for example, the federal bills introduced in 1969 were included in the Elementary and Secondary Educational Amendments of 1969 (P.L. 91-230) mandating a report to Congress on the status of and need for programs for gifted students. U. S. Commissioner of Education, Sidney P. Marland submitted the mandated report to Congress. The Marland Report (1972) included both a federal definition of
gifted and talented students, and a national assessment of gifted education programs. Between 1973 and 1974 several bills were introduced in both houses of the 93rd Congress that resulted in the establishment of the U.S. Office of Education’s Office of Gifted and Talented. These bills also included annual appropriations for the Office of Gifted and Talented, research and demonstration projects, training grants, and a national gifted education clearinghouse (Gallagher, 2015).

District documents indicated the program in the Suburban District also expanded in 1974 with the establishment of Gifted and Talented programs at every elementary school. Students in grades three through eight who scored between 120 and 139 on tests such as the Otis Lennon or the Cognitive Abilities Test could participate in the school-based program. This provided Suburban District students with two levels of gifted education services.

In 1975 funding for federal efforts was limited to 2.5 million dollars. In 1977–1978, bills were again introduced in both houses of Congress in support of gifted education. The Gifted and Talented Education Act (P.L. 95-561) passed. The late 70s also brought more funding for gifted education. In 1978–1980, with the support of President Carter, appropriations increased from 3.8 million to 6.2 million dollars (Gallagher, 2015).

1980s National Commission on Excellence in Education: A Nation at Risk

The 1980s brought alarming reports both nationally and in the Suburban District that raised concerns about the effectiveness of efforts to develop the academic potential of all students. With the election of Ronald Reagan and a new administration nationally, funding for gifted education decreased by 42% in fiscal year 1981 due to the Omnibus
Budget Reconciliation Act of 1981 that consolidated 20 programs into Chapter 2 block grants for state and local educational agencies. In order to encourage business and education entities to partner for the education of the gifted, the National Business Consortium was established between 1982 and 1983. Also during that period, the National Commission on Excellence was established. This entity conducted hearings nationwide on six aspects of public education including gifted education. In 1983, the National Commission on Excellence in Education published its report mentioning gifted education entitled, *A Nation at Risk*, the general premise of which was that America’s schools were failing. This document led to efforts, though believed by many to be at odds with many of President Reagan’s initiatives, was considered to be a milestone in public education and led to many education reform efforts on the national, state and local levels.

Between 1983 and 1984 a caucus on children was established by the 98th Congress that included a mandate to explore the impact of federal budget cuts on children, especially children from special populations (Gallagher, 2015).

In 1986, concerns about addressing underrepresentation in the gifted education program in the Suburban District began to emerge. A school district committee assigned to study the issue of underrepresentation submitted a published report regarding the underrepresentation of African-American and Latino students identified for participation in the Gifted and Talented Center, and in the school-based programs using the then-current test-based screening process. Concerns were raised that these tests were not normed for the targeted underrepresented populations. Later that year, the committee published a report and submitted it to the school board that confirmed the inadequate number of African-American and Latino students identified for participation in gifted
education in the district. The committee stated their concerns that the test was not normed on students from underrepresented populations. The 1988 Annual Report to the State confirmed that African-American and Latino students in Grades 3-6 were underrepresented in the Gifted and Talented program and provided further documentation for the committee’s findings.

Although the Suburban District had not met their goal for increasing African-American and Latino students in its gifted education program in 1988, that same year, national legislation passed that had the potential to change that outcome. With the 1988 passing of The Jacob Javits Gifted and Talented Students Education Act (Javits) by Congress as part of the Elementary and Secondary Education, funding to support scientifically-based research, demonstration projects and innovative gifted education strategies targeting traditionally underrepresented students was provided by the federal government (Gallagher, 2015). The 1980s ended with the Suburban District continuing efforts to identify the best strategies for addressing underrepresentation. In 1989, district documents indicated the Suburban District appointed a Gifted Center Identification Committee to study identification procedures and recommend changes that could address the problem of underrepresentation potentially lead to increased African-American and Latino student participation in the Gifted and Talented program.

**1990s Implementing Multiple Criteria for Identification**

While little changed nationally in relation to policies impacting gifted education in the 1990s, important policy changes began to take place in the Suburban District. In September of 1991, the Suburban District’s Gifted Center Identification Committee submitted a preliminary report to the school board. In this report, they identified two
primary areas of concern, which were the limited scope of the criteria for determining eligibility, and the fact that, to obtain the 140 IQ score required for placement in the Gifted and Talented Center, families who could afford to do so were hiring private psychological testing. The committee recommended that the criteria of one intelligence test score be replaced with scores from two group ability tests, Otis-Lennon School Ability Tests and the Cognitive Abilities Test. They also recommended adding other criteria such as achievement test scores, and school progress reports. In addition, they proposed the development of a rating scale in order to give teachers a tool for use in their classrooms that would allow them to document gifted behaviors they observed in their students.

Between 1991 and 1993 the new criteria was extensively studied through pilot testing in the Suburban District. When the school board adopted the new identification procedures in 1993, they ended a 30-year process of identification based on a single test score. During this period, the school-based pullout program continued its focus on critical and creative thinking lessons that had little connection to the General Education curriculum. From June 1988 to June 1999, however, Asian student participation had increased in the Gifted and Talented Center program from 6.5% to 16.8%. In the Gifted and Talented School-based programs, Asian student participation had increased from 8.8% to 14%. Due to these increases, Asian students were no longer one of the targeted underrepresented student populations. By 1999, the Annual Report to the State indicated that African-American and Latino students remained significantly underrepresented. The Suburban District’s Gifted Coordinator reflected on this period:

I’ve been part of it from the beginning and continue to advocate support for it. I
think when I first started introducing the idea of the Academic Potential Project, I was actually a classroom teacher at an elementary school. I had been a GT center teacher for eight years. Then I got my Master's in Gifted Education and I became a National Board Certified Teacher. I realized that a lot of what we did in gifted education was best practice. That was when I was in a GT center. I decided to go into gen. ed. [general education] for a couple of years, and working in a school that was more diverse. I had English language learners and students from poverty and students that were pretty affluent in the same classroom. It was my own personal research project. I worked at that elementary school for two years and I used everything I'd done in the GT center with the students in those classes. One year I had sixth grade, and the next year I had fifth.

She continued:

Of course I found that there were students that were gifted that didn't go to the center because they didn't want to leave their local school, and who weren't used to being challenged. It took a while to get them comfortable with the fact that everything didn't come so easily. I also found that there were students who were highly gifted, but that was never recognized because they either were English Language Learners, or they were from poverty, and they hadn't had a lot of experiences. When I started to look at their work samples and collect evidence of their thinking, I actually built a portfolio for them. The first year I had sixth grade and they'd gone on to middle school. That year I developed a portfolio for three particular students. One of them was an African American girl who lived on Route One and came from a low socio-economic level. Another was a young boy
who was Korean and didn't speak English that well. The third one was another African American boy who has lived in lower economic housing on the highway. They were such smart kids and they thrived in that learning environment that I was able to create based on my experience teaching gifted. They got in even though their test scores didn't support placement. I was able to go to the screening committee and advocate, and they were found eligible for gifted services in middle school. The next year they were in seventh grade. Then I'd gone down to fifth grade. They came back to me. They were very disheartened because the teachers were questioning why they were in these classes. I worked with them on weekends and after school. A lot of it was grammar. What it made me realize is that fifth and sixth grade is really too late. You've got to start earlier. I knew they had the potential, but they didn't have a teacher that saw that potential. They didn't always have the skills that they needed to be successful in the higher-level courses. I actually started talking to our superintendent at the time.

The Gifted Education Coordinator also described other conversations that began during that time period to develop a strategy for beginning this reform locally. Between 1999 and 2000, an informal task force of principals and teachers from schools with high levels of students from populations underrepresented in the gifted education program were charged with rethinking identification and delivery of gifted services to students.

**2000s The Academic Potential Project and No Child Left Behind (PL 107-110)**

The result of the efforts of the task force was the birth of the Academic Potential Project, a strength-based model with the goal of access, advocacy, and affirmation for students with high potential from populations typically underrepresented in gifted
education. Participants’ statements, articles and district documents indicated that, informed by research, the task force determined to focus on early identification, and differentiated instruction using academically rigorous curriculum. These included critical and creative thinking lessons, but also a basic change in the delivery of school-based gifted services from a once a week pullout model to a collaborative teaching model. The Gifted Resource teacher’s new role would be to model lessons for classroom teachers that would illicit higher level thinking and provide opportunities to identify gifted behaviors.

In 2001, the development of this new model for identifying underrepresented students in the Suburban District occurred in the same year President George W. Bush’s signature education reform law, Public Law 107-110 known as No Child Left Behind Act (NCLB), passed in 2001 and was signed into law on January 8, 2002. This was the updated version of the Elementary and Secondary Education Act (ESEA) signed by President Lyndon B. Johnson in 1965, a year after the Civil Rights Act was passed. The new law linked access to Title I funds to academic standards and assessment requirements (Tanner, 2013; The Education Trust, 2004). The assumption of this law’s key requirement was that proficiency for all could be demonstrated by high-stakes testing.

While underachieving students were well researched and well supported by NCLB, there was no incentive created by the law for schools to collect data on advanced learners or seek to increase the number of students achieving at advanced levels (Beissner, 2008; Chudowsky et al., 2009; Cleaver, 2008; Duffett et al., 2008; Mathews, 2009; VanTassel-Baska & Stambaugh, 2007; Wyner et al., 2007). This federal policy and consequential funding narrowed the focus of the curriculum in many districts from
seeking to ensure that all children reach their highest potential, to merely focusing on equity of outcome (Gallagher, 2004; Kozol, 2006). This law was considered to be harmful to gifted students’ development. Because low-income, cultural minority, high-achieving students easily meet the proficiency goals of NCLB, they were often left out of the policy discussion and were, too often, not challenged to achieve at their highest potential (Taliaferro & Decuir-Gunby, 2008; Wyner et al, 2007).

In the Suburban District these federal policy changes did not sway their commitment to becoming more effective in targeting and serving gifted students from underrepresented groups. In the 2001-2002 school year The Naglieri Nonverbal Ability Test replaced why the Otis Lennon School Ability Test. The Naglieri, a complex series of geometric shapes and designs that requires higher-level problem-solving skills, is thought to be a more fair assessment especially for non-native English speaking students (Carman & Taylor, 2010). One assistant principal described how unfair she had thought the testing to be prior to the switch to the Naglieri:

The Naglieri, it’s a nonverbal test, and so it takes out that language factor which inhibits many students from doing well on the CogAT if they’re second language learners. You know, I used to have kids who were brand new to the United States and were just acquiring the English language at the time, and we’d give them the CogAT because that’s what I had to do, and it was painful. Why are we giving this testing to this child? This is so inappropriate. It’s an English test not an abilities test.

The new policy required all second graders, in the fall of their second grade year, to take the Naglieri and Cognitive Abilities Test. They also continued to implement the multiple
criteria, case study identification protocols.

The Gifted Education Coordinator recalled that they did face some challenges in the early days of the development of the Academic Potential Project. One challenge was the mindset of the teachers:

I'll never forget the first screening process. The resource teachers started bringing their files for central selection through the Level IV Center. We would give them the list of students that made the second grade pool. That means they had to score 132 and above on an ability test. I'll never forget, this one teacher from Mount Eagle. She had tears in her eyes. I said, “Sarah [pseudonym], what's the matter?" She said, "Well, all these people are complaining because they had too many files." She said, "I don't have any because there's nobody in my school who's gifted."

She taught at a school with 85% poverty. I talked to my team. We decided to pull together these principals. We pulled together the 22 principals of Title One schools. We invited them to a meeting, and I think about 12 came. We just started talking about it. One of the principals, the one at Sarah's school, said, "Part of the problem is you're starting too late. You've got to start in kindergarten so that they have those basic skills." She said, "By the time they get to second and third grade, they're so far behind," she said, "it's hard to catch them up." She said, "You just have to start early, and I'll let you use my school."

I went to the Assistant Superintendent for her region, or her area at the time and he gave us money. I explained to him what we were doing and the background, the research and everything. He gave the school maybe $6,000 to do
a summer school program. People in my office at the time worked with the resource teacher at that school, and they started going into classrooms and doing these model thinking lessons and different strategies, and they started recording evidence of what students were thinking. Most of the time, many times, teachers don't think kids can think at a higher level because they don't give them an opportunity to do so.

Even while managing this change in practice, school board minutes indicate the Suburban District’s Gifted Education Program office was managing the growth of the school district and its impact on serving students in gifted education. On November 7, 2002, school board minutes reflect a Commendation of the district’s Gifted Education Coordinator, Elementary School Team and Instructional Services staff members for their work on the boundary meetings for the new elementary schools and the Gifted and Talented Centers. They were also commended for their responses to the Gifted and Talented Advisory Committee annual report that was described as one of the most constructive responses the Superintendent had ever seen to a School board advisory committee.

In 2003, not only did the Suburban District open six new Gifted and Talented Centers, but also that was the year that the inaugural Academic Potential Project class was implemented at a Title I school in the district. The model was adopted by more schools in the district in what was described by several interview participants as a “grassroots” manner with principals sharing with their peers the success at their sites.

The district’s gifted education program was not without challenges, however. In November of that year, the Suburban District’s gifted education program was the target
of another OCR complaint. The Complainant alleged that the Suburban District discriminated against Whites in favor of African American in admissions to its flagship magnet school. It would take several years and special statistical analyses, given the small sample size of African American students, before the district received a Letter of Findings.

To provide a more formal assessment of the model’s strengths and potential for growth, in March of 2006, the district’s Office of Evaluation and Research conducted the Academic Potential Project’s First Interim Evaluation Report. Suggested opportunities for improvement included:

- Establishment and consistency of guidelines for management and administration of the implementation of the model.
- Consistency of the student identification process
- Need for additional resources to fully implement the model and support staff development
- Continuous revision of the curriculum to be response to the learning needs of diverse students.

The strengths of the model were noted as well including its student identification strategies, alignment with program design, staff development and curriculum and instruction.

In 2006, as the Academic Potential Project grew in the Suburban District, with the passing of the American Competitiveness Initiative, gifted education on the national level experienced another pendulum swing. Although school districts still had to contend the limitations imposed by NCLB, the American Competitiveness Initiative focused on
research and development in STEM disciplines. It represented the largest investment in
STEM since the Apollo Space program in the 1960s with a sustained investment of
approximately $137 billion (Bush, 2006; Gallagher, 2015). Goals of the American
Competitiveness Initiative funds were stated to include “increased professional
development for teachers, attracts new teachers to the classroom, develops research-based
curricula, and provides access to flexible resources for worker training” (Bush, 2006,
para. 3).

The Suburban District also continued to invest in strengthening its ability to serve
gifted students. Two of the most significant historical transitions in the program occurred
in 2007. In 2007, in a memo from the Superintendent to the School Board, referencing
the Staff Response to the 2007 Gifted and Talented Advisory Committee Report, the
Superintendent noted that the Gifted and Talented Program had met the state’s local plan
requirements. The gifted education program’s leaders indicated a continued commitment
to offering Level IV services in both the gifted centers and the local schools. This
historical transition in the program’s identity was reflected in the memo confirming the
name change for the Gifted and Talented Program. The program’s name would no longer
include the term “gifted” but more meaningfully reflect the program’s focus on nurturing
higher academic achievement in mathematics, language arts, social studies and science.
In addition, in 2007, with a new district-level regulation, the Suburban District added a
Gifted Education Endorsement requirement for teachers of students receiving gifted
education services. This requirement represented an even greater commitment to serving
high ability students, and exceeded the Virginia required qualifications for teachers of
gifted students.
Not only was the Academic Potential Project growing and serving more historically underrepresented students, it continued to be an important component of districtwide equality efforts. In 2009 and 2010, the Plans and Programs Tied to Closing the Minority Student Achievement Gap in the Suburban District, listed specific challenges related to the educational opportunities available to African American and Latino students. It included specific action steps, timelines, and tasks determined to be necessary to increase academic rigor and close the opportunity gap. The Academic Potential Project was listed as a central strategy. Since its inception, the Suburban District has found the Academic Potential Project an important means by which to address issues relating to the achievement gap and equal opportunity in the district. The Gifted Education Coordinator recalled:

When we first started the Academic Potential Project, we had an OCR complaint. The administration, the leaders kind of used the Academic Potential Project—They've always used Academic Potential Project to show what we're doing to try to increase our underrepresented minority groups in gifted programs. It's always been a big part of closing the achievement gap for the county.

Key to those efforts was continued professional development for Gifted Education Program staff and teachers on research-based best practices in gifted education and pedagogy with experts in the field brought in as special guest presenters.

Nationally, in 2009, President Obama and Secretary of Education Arne Duncan announced Race to the Top, a program that was funded as part of the American Recovery and Reinvestment Act of 2009. Considered by some to be a shift from promoting equity
to promoting excellence, school districts that included college and career readiness in their plans received stimulus funding (Baker et al., 2013).

2010s Professional Development, Twice-Exceptional, Every Student Succeeds Act (ESSA)

In the beginning of the most recent decade, the Gifted Education Office took even more ownership of delivery of its professional development requirements and content. In collaboration with a research university, the Suburban District’s professional development efforts expanded in 2011 to offer a multimedia resource center as well as an online graduate level course. As described on the district’s website, this course was comprised of four modules designed to enable schools to adapt the Academic Potential Project to meet the needs of traditionally underrepresented students at their sites. To help teachers understand the importance of serving underrepresented students, the district also developed and funded an online graduate course entitled, Underserved Populations of Gifted.

During the 2011-2012 academic year, the Suburban District’s Office of Instructional Services collaborated with the Office of Special Education to implement a program entitled, Twice-exceptional Learners. Through this effort, they provided parent and teacher workshops around the needs of Special Education students who have the ability to think, reason and problem solve at high levels. In 2012, the Academic Potential Project was recognized in a the National Association for Gifted Children’s 2012 publication as a successful program the supports low-income, high-ability learners.

While the OCR complaint filed in 2003 was concluded in May 2012 with the determination that there was insufficient evidence to support discrimination against
White students in the admissions process at the flagship magnet school, the Suburban District was soon to have another OCR complaint filed regarding its gifted education program. After the recognition of its Academic Potential Project in June, in July of 2012, the National Association for the Advancement of Colored People (NAACP) and another advocacy group filed an OCR complaint against the Suburban District alleging discrimination in admissions at its flagship magnet school filed on behalf of all African American, Latino and disabled students. Also, they alleged that the lack of admissions of Latino and African American elementary students in the Level IV services was a disruption to the pipeline for admission to the magnet school and ensured fewer would be eligible for admission. In September the complainants received a notice of partial dismissal due to the determination that the total number of disabled students identified as gifted fell within the predicted for the Suburban District. OCR opened the portion of the complaint filed on behalf of African American and Latino students.

In 2013, local university researchers studied the Suburban District’s Gifted Education Program and presented findings to the Suburban District’s School Board on June 27, 2013. The researchers used the National Association for Gifted Children’s (NAGC) Programming Standards, the Virginia Department of Education’s Regulations Governing Educational Services for Gifted Students and practices in four similar Virginia school districts. In each area examined, the Suburban District met or exceeded NAGC Standards, VDOE Regulations and comparable local, state and national. Also by 2014, the Suburban District had accumulated over 10 years of comparative data on the participation of African American, Latino and other underrepresented students in the Level IV Gifted Centers, and school-based services for students grades K-8 (see
Appendix C).

Gale (2001) pointed out the importance of documentary and statistical evidence when using historiographical methods in order to ensure that the examination of past events is contextualized. This chronology represents both documentary and statistical data that contextualize the policymaking process and suggest an impact on outcomes due to the policy changes regarding identification and nurturing of gifted potential in students from historically underrepresented groups in the Suburban District. As can be seen in Table 1 and Table 2, significant change in participation is evident in Level II, III and IV services since the policy changes were implemented. For example, in Table 1 while only 76 African American students participated in Level IV services in 2000, for example, in 2014, 928 African American students participated in Level IV gifted services. In addition, as indicated in Table 3, among Latino students participation rose from 66 students in 2000 to 1419 students in 2014. This represented an increase of over 565% in the participation of African American and Latino students in the Suburban District’s gifted education program.

Table 1

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<th>Asian</th>
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<td>5,990</td>
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*Note. GT = gifted and talented*

Table 2

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<td>4,079</td>
<td>86</td>
<td>4,678</td>
<td>1,225</td>
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</table>
In 2015, with the passing of the Every Student Succeeds Act (ESSA), the most recent iteration of the Elementary and Secondary Education Act of 1965 (ESEA), there was growing optimism regarding the nation’s support of gifted learners. In addition to allowing Title I funds to be used for not only struggling, but advanced learners, the ESSA retained the Javits Gifted and Talented Students Education Program and included other provisions thought to be supportive of gifted education (National Association for Gifted
Children, 2015). National policies that support gifted education are important to the work of nurturing high ability learners from every socio-economic, race or cultural background, but the district-level policymaking and school-level leadership in the Suburban District’s continues to demonstrate its leaders’ commitment to serving all gifted learners. As of the 2015–2016 academic year, there are 84 schools actively implementing the Academic Potential Project in the Suburban District. There are Academic Potential Project students in every school, however. At the elementary level, Gifted Resource Teachers advocate on the students’ behalf. At the secondary level, counselors serve as the students’ advocates.

Chronology: The Backdrop

As this chronological history of policy and practice in the Suburban District indicates, from the inception of its Gifted Education Program in 1964, national, state and local policies influenced the underrepresentation of African American, Latino, and/or low-income students in its gifted education program. Against this backdrop, the Suburban District Gifted Education Program Coordinator, staff, principals and teachers formed a task force and sought to understand, and change the conditions that led to this persistent underrepresentation. Although the issue was deeply rooted, the commitment of the task force to identifying best practices in identification and nurturing of talent in this population of learners was persistent, and, after nearly 20 years of implementation, data supports perceptions by participants of its effectiveness.

Cox (2001), when discussing welfare reform in Denmark, the Netherlands, and Germany may have provided some insight as to how support for the development of the Academic Potential Project came to be in the Suburban District. He pointed out that
while Germany was similar to the other countries in its nature, its culture, its history and its institutions, Germany’s failure to successfully reform welfare compared to Denmark and the Netherlands could possibly be explained by one factor the author believed to be often overlooked. Cox described this factor as “the social construction of the need to reform” (p. 464). Cox (2001) suggested that the way political leaders framed issues made the difference. Instead of polarizing rhetoric as in Germany, leaders in Denmark and the Netherlands framed the issue so that widespread support could be generated. This theory can be applied to the Suburban District’s Gifted Education program. Data drawn from document review and semi-structured phenomenological interviews suggest the Gifted Education Program Coordinator and her team were quite effective in the social construction of the need to reform gifted education in the Suburban District. By gathering administrators to form an informal task force to not only examine issues related to underrepresentation, but also, together, develop a plan of action, she laid the foundation of philosophical agreement that would lead to the reform of gifted education in the district.

National policies sometimes buoyed their efforts. At other times national polices presented barriers. It was major state and local policy changes, however, that shifted the process for identification from a single criterion to multiple criteria. State policies also supported the development of a strategy for serving students from underrepresented groups. The local professional development and endorsement requirements for Gifted Resource Teachers, Level IV gifted instructors and middle and high school full-time Honors, AP and IB teachers, however, exceeds even state requirements for teachers of gifted students. These changes have resulted in a significant increase in the participation
of African American, Latino and/or students from high poverty receiving gifted education services in the Suburban District. The culture of referral was clearly affected by the beliefs and attitudes of the district’s Gifted Education Coordinator whose conviction that students with high academic abilities come from every community. The change in gifted education program policy and practice in the district exemplifies a positive connotation of the social construction of knowledge, and the social construction of the need to reform. Also foundational to changes in the district was social construction and policy design. Each will be discussed further in the examination of perceptions expressed in the semi-structured interviews of participants.

**Semi-structured Interviews - Findings**

The conceptual framework underpinning this study is social construction theory (Berger & Luckmann, 1966). To revisit the application of social construction theory to Schneider and Ingram’s (1993) model for policy development, policies reflect certain values and interests and produce experiences that influence behavior values and participation. Certain patterns and logics of policies reflect certain values and interests. In both the social construction of groups of people, and the social construction of knowledge, these logics and patterns exist (Nedlund, 2012). Participants perceptions, as expressed during semi-structured interviews demonstrated the aforementioned logics and patterns reflective of both the social construction of groups of people and the social construction of knowledge.

Because of the framing of the Academic Potential Project as a model, rather than a program, responses to semi-structured interview questions reflected a sense of efficacy on the part of stakeholders and a sense of freedom to shape their social worlds, as related
to the implementation of the Academic Potential Project at their sites. Their stated perceptions of the policy development and implementation of the Academic Potential Project reflect a sense that certain values and interests influenced behavior and participation.

**Leadership**

Participants were asked questions designed to elicit responses reflective of their perspectives on policy or practice in the gifted education program to further clarify the study’s research questions. Examples of questions around gifted education policymaking included: 1) What, if any, influence do you think federal and state policies, have on identification, referral and classification practices? 2) Did other documents, policies or policy language impact the writing of the plan for the Academic Potential Project? 3) How, if at all, has the annual state funding affected the Advanced Potential Project implementation?

Practice-related questions included: 1) Describe those activities that you believe were effective in addressing the problem of underrepresentation. 2) How, if at all, has the Advanced Potential Project changed through the years and what, if anything, motivated the changes?

Whether questions were related to policy or practice, the concept of leadership, and specifically, the leadership characteristics of the district’s Gifted Education Program Coordinator became central to the conversation. Subcategories that emerged were: 1) Social justice leadership and 2) Use of data.

Cox (2001) described the reform process as political in that, from a social constructivists perspective, all actors may not perceive a need for reform. He stated:
Indeed, many actors will be resistant to the idea of change or will deem any change as not in their interests; they will therefore oppose altering the status quo. In a political environment, the advocates of reform need to employ strategies to overcome the skepticism of others and persuade them of the importance of reform. In other words, they must create a discourse that changes the collective understanding. (p. 475)

A definite influence districtwide on the discourse and values reflected in the policies impacting the Gifted Education Program, in general, and the Academic Potential Project, in particular, is the leadership style of the Suburban District’s Gifted Education Coordinator. One principal, Participant #14, had held several school-level roles in support of Academic Potential Project students throughout her career in the district. These included General Education classroom teacher, Gifted Resource Teacher, Instructional Coach, and Assistant Principal. Noting her experience of the Gifted Education Coordinator’s consistency whatever her own role had been, she offered this perspective:

All of my 15 years in the Suburban District, our district’s Gifted Education Coordinator has been the lead, and in charge of Gifted Education. Not a lot of turnover [in that department]—which is phenomenal. Her office has been helping to sustain the program. I believe she does quite a bit of staff development with her Gifted Resource Teachers, and getting them the type of resources that they need to be successful with the Academic Potential Project students, but also to get the message out to the schools and community. Another big component of that is she often meets with the principals or administrators of those schools, because it is very difficult to fulfill ideals of the program when you don’t have the support of
the leadership team in the school. And so I believe a lot of that is attributed to her leadership in that she does support schools and provide for them. So there are times where the county wouldn’t fund an Academic Potential Project summer program. Well, the Gifted Education Coordinator’s office would look at the needs of that particular school, and if they had several Academic Potential Project students who could benefit, she would designate funds and then meet with the school principal and say, “Well how much can you come up with? This is the amount that I can give you, so that we make sure those Academic Potential Project students aren’t sitting home in front of TV over the summer or getting into trouble.”

She concluded:

I think it goes back to that idea of “having the right people on the bus.” I think our Gifted Education Coordinator was really strategic in making sure she had the right people and working with, I say, the right schools—schools that were really struggling in one way, but had a lot of potential. Schools like some of the Title I schools…Has this been a quote? Many of those schools were full of Academic Potential Project students and we really had an opportunity to do something great. So our Gifted Education Coordinator’s been following the very first set of Academic Potential Project students since its inception, and every year it was something wonderful. She’d put out a news article, and she would share some of the progress of those students, and I believe, if they’re not seniors, they’re in either the first or second year of college. I don’t even know if they have graduated or you would have that data but I remember her sharing that information. She has
an Academic Potential Project principals’ meeting, and she provides resources for those schools and those Gifted Educations Resource teachers.

One Gifted Resource Teacher, Participant #5, spoke of the Gifted Coordinator’s intentionality in leading change:

Obviously our district’s Gifted Education Coordinator created that, the model, in 2000 and then went on to share that...She formed a committee and had administrators, mostly from Title I schools, and teachers talk about what they could do. Within that, they really wanted to address the idea that we need to be more focused and aware that there was underrepresentation, and that we needed to take on responsibility by doing more sorts of cultural training, developing cultural competency, and then looking for giftedness in different ways. I feel like I’ve supported that mission.

If how the Gifted Education Program Coordinator’s fulfills the responsibilities of her position is perceived as intentional, she would agree that it is. She recounted how her experiences as a classroom teacher informed how she carries out her current role, and described how having worked both as a general education and gifted education teacher, she realized many students who were non-native English speakers, African American and/or from poverty were unlikely to be identified for gifted services. She had, however, found students in her 4th and 5th grade general education classrooms who demonstrated higher-level thinking, but whose grammatical skills in English often masked those abilities and made teachers reluctant to identify them for gifted services. She sought ways to make a difference. She began a portfolio of work samples on students she’d identified in her classroom and advocated for them to receive gifted services, but the students were
disheartened by teachers not feeling they belonged in the classes, often wondering aloud what they were doing there. She described how she would work with the students on Saturdays to try to close those gaps, but had to concede that started in 4th and 5th grade with these students was too late. Having begun a doctoral program, she shared her concerns with her professor and also with the then-superintendent. She recalled:

They affirmed what I was thinking, that there are kids from poverty, kids that speak other languages, that aren't going to be identified. Then an opening came in central office and I applied to be a coordinator. I realized that as a teacher I could help students one by one, and I got a lot of satisfaction doing that. I realized that if I went to central office I could be a part of a larger change agent.

**Social justice leadership.** Several participants mentioned “social justice” as they described the district’s Gifted Education Coordinator’s leadership. Burke (2010) noted that the Nineteenth century Catholic scholar, Luigi Taparelli d’Azeglio is thought to have coined the term *social justice* (p. 98). He believed all people were to be treated as equals including the poor and disenfranchised (Behr, 2000). Touchton and Aker-Hocevar (2001) defined social justice as “fighting the inequities, discrimination and injustice that impact student achievement and the success of all students” (Touchton & Aker-Hocevar, 2001, p. 3). Theoharis (2007) sought to expand the conversation on leadership for social justice beyond the identification of schools that had demonstrated success in serving diverse student populations even while serving White, middle-class and affluent students by augmenting the understanding of administrative practice as it relates to social justice leadership (Theoharis, 2007). One principal, Participant #9, stated:
I think that the reality is, from a central office perspective, I think we have top-notch leadership. I think our district’s Gifted Education Coordinator believes in this program and advocates for this program in ways that other people in equivalent positions within central office have not been able to advocate for their programs—and I think you see that it’s working. You see kids are going on to take higher level math at earlier grade levels, and that they’re successful. And you can’t argue with that when you look at the data and you see how, if students are coming into, either the regular Level 4 program or local Level 4 program, they are being successful, and are more than capable of meeting that challenge. In fact, they are thriving.

An assistant principal, Participant #11, described the impact of the “genuineness” of the Gifted Education Coordinator’s commitment to the Academic Potential Project students:

I talked about how our Gifted Education Coordinator collected data and all of this other stuff, but our district’s Gifted Education Coordinator is a true leader. She’s a true instructional leader, and an advocate for kids. And that is a huge factor in it. People believe in her because she always does right for kids. Everything she does is always in the best interest of kids, supporting teachers and schools, and people see that genuineness about her because she shows it and she follows through with it when she says what she’s going to do. I think that is a big factor, too, and why it’s been sustained.

She added:

I think the reason that is has survived is people are passionate about the reason why we have the program, and, you know, our Gifted Education Coordinator and
her team always has had principal meetings and has had teacher meetings to really hone in on the Academic Potential Project model. And when we had these meetings, these meetings weren’t just lecture—“This is what I’m going to tell you about.”—It was principals bringing forth the great things that they’re doing in their school and that’s contagious, too. So it’s the belief, too, that it’s not just from central office, it’s these professionals, teachers, educators, principals who have excitement for it, and want to pass it on to others. That’s a big part of it.

Leadership theories continue to evolve. They vary in focus from targeting behaviors and traits to organizational contexts such as the great man, behavioral, situational, contingency, and transactional theories or leadership concepts such as servant leadership, value-added leadership ecological leadership (Beyer, 2012; Hoy & Miskel, 2013; Uzohue1, Yaya, Oluseyi, & Akintayo, 2016).

The impact of the Gifted Education Program Coordinator’s leadership style and the echoes of her philosophy can be heard in the words of the teachers, principals and educational specialists interviewed for this study. As the Secondary Gifted Education Specialist, Participant #8, pointed out:

I think the more awareness about the purpose of the Academic Potential Project Model tends to provide more momentum for its use, recognition, and success. So when we began looking at social justice and the concept of leadership that really is easy to address with leaders these days more so than in the past I think. And when we began having this conversation with teachers and some of our schools with students of high proportions of poverty or without opportunity, it’s humanity I think that continues to push that train along in the sense of understanding when
the more we learn about culturally responsive practices and teaching and leading. So I think that there’s a multi-pronged approach to seeing how the model has sustained itself prior to their being a big, big...More awareness of a CRT, or an idea of having this social justice being met with education.

Participant #8 continued:

I think, in general, the challenge has just been time and awareness; the opportunity to interact with leaders when they are spread thin, when they have many responsibilities to navigate through throughout the day. I think other challenges that we’ve successfully navigated that I think actually are more prominent in the elementary and middle school are the fact that we are really concerned about test scores and the fact that unless one is a progressive thinker around and leader, then a school leader might get caught up in the fact that, “My test scores don’t reflect what they should or where I want to be.” So they look for many, many different means to consider how to get test scores up rather than nurturing and caring for kids in a Maslow type fashion where you would say, “I can’t get the kid to really perform if they don’t know how much I care.”

One of the principals interviewed, Participant #9, noted the desire of leadership, school-level administrators and teachers to respond ethically to the demographic changes in the district:

I think what you see is rapid demographic change within our district, and I think that people who work in schools want to do right by kids. I look at our changing demographic here at our school, and we have not always been a Title I school. We’ve been open for 25 years, and when we first opened, apparently, there were 2
ESOL kids in the whole school. Now, it’s just completely, completely different, and so I think you have those demographic changes that force you to look at what are we doing and how do we support. I think part of what helps to sustain that, to build and grow the program, is that people see that it works.

One of the Elementary Gifted Educational Specialists, Participant #10, shared a similar idea about the moral imperative for the Academic Potential Project and the changes in gifted education identification in the district:

I think what’s motivated that change really, is it’s the principle. We’re making a difference in students’ lives, and we’re making a difference in the achievement gap, and we’re making a huge difference in access.

A Gifted Resource Teacher, Participant #2, linked the concept to her sense of personal calling and the mission of their school:

Okay, so when I think about interaction between the calling that I have and the mission of the school, they need to connect, right? So, the mission of our school is to nurture the potential, to develop students who are critical and creative thinkers and can solve problems that they see and show compassion in the world. So if we tie it to that mindset and that mission and vision of the school, then the Academic Potential Project will support that naturally. The school is the 6th poorest in our district and about 70% of our students are on free and reduced-price lunch, and the majority of our ESOL students come from a Latin American backgrounds where Spanish might be the only language spoken in the home.
That one districtwide policy regarding identification was clearly communicated by the Gifted Education Coordinator to Gifted Resource Teachers, Administrators and District-level staff alike was evident as sample statements below indicate:

- Gifted Resource Teacher, Participant #6: Our district’s Gifted Education Coordinator would always say, “For Academic Potential Project students, we err on the side of inclusion,” so if we weren’t sure, then we would just make them an Academic Potential Project. Because she always says "It’s not going to hurt them."

- Assistant Principal, Participant #11: But one thing that helps, I think, myself, and other Gifted Educations Resource Teachers at the time—or Gifted and Talented Resource Teaches at the time in those years was that Our district’s Gifted Education Coordinator had said along the lines of, “You err on the side of inclusion. So if there’s any question about it, you err on the side of inclusion.”

- Elementary Gifted Educational Specialist, Participant #6: Then for the identifying the Academic Potential Project, we talk to them about kind of erring on the side of inclusion that you're looking for students like we say the three As. They don't have access. They don't have advocacy. They don't have affirmation. They're from a single parent family. They're from a minority background. They show great potential.

The Gifted Education Coordinator’s transformational leadership style was evident in the transfer of her own values and philosophical underpinnings as expressed by participants and as evidenced by the effective social construction of the need to reform policy and
practice in gifted education in the district.

**Use of data.** The fact-value dichotomy attributed to Weber suggests facts to be separate conceptually from value and is foundational to the understandings of social constructivists. Noting this, Cox (2001) argued, however, that values can be attached to facts:

The existence of facts in the physical world has a strong impact on the way we construct our understandings, but our cognitive capacity allows us to attach values to those facts that give them a special meaning. These special meanings then influence the way we plan our actions. (p. 474)

The attachment of values to facts was suggested by the Gifted Education Coordinator’s use of data. There was also considerable mention by participants of the Gifted Coordinator’s use of research and data as tools for program development, curriculum selection, instructional pedagogy, and program advocacy. As one Gifted Resource Teacher, Participant #4, stated:

We’re not just making this stuff up. We’re using real, solid curriculum from William and Mary, from UConn, from various sources that have been tried and true that work with kids to get the critical and creative thinking going. We’re using tremendously well-tuned curriculum and we’re sharing that with others so that they can use it, too, so I think that we’re definitely on the right track. There’re just so many great things that are going on. All I can say is it needs to continue and needs to be spread throughout the country.

An Assistant Principal, Participant #11, participating in the study also pointed out:

Another part of it, too, all along the way, our Gifted Education Coordinator has
always done research and ran her numbers and showed her data and is very transparent about her data to people who ask questions about the program.

Keeping that data and seeing how the data has changed for a more inclusive gifted program has helped solidify its existence.

Several participants mentioned the Coordinator’s commitment to keeping data to continue to nurture and support students after they have been identified. One of the Elementary Gifted Educational Specialists, Participant #10, described the high value placed on data usage in the Academic Potential Program:

That’s something that we’ve been intentional about. The people that have been referred, we start keeping that data as well. That would be something I would look at as well. We’ve also been trying to capture stories as well. I mentioned a student who has grown up in the Academic Potential Project. We have a couple of his videos up. I did a little feature on him on the newsletter last year. Then he spoke to our Level IV teachers, Gifted Resource teachers, then some General Education teachers at our fall institute about his journey. Later, we brought him in to speak to the principals, the Academic Potential Project principals meeting. If you look at his video, it’s powerful. He talks about how, what you could do to support Academic Potential Project. Things you might not be aware of. Everything from, "Hey, I didn’t have materials to do projects. So when you’re talking about giving me access to this, but don’t support me, I’m in trouble."

This sort of anecdotal data based on the student’s experience is valued in the district as well, according the Secondary Gifted Educational Specialist, Participant #8, who participated in the study:
Often times we just look, and I say we—the royal we—we look at data, and data is whether we achieved success or not, and the data being an outcome of an exam. I think, maybe this is part of the goal, but it’s our mixed methods of sorts. It’s our ability to get anecdotal feedback that really provides us with those growth edges when we go, and we haven’t been successful.

Participant #8 continued:

I think that’s really where the challenge has come and how we’ve hurdled that is through continued education and also through our data. We have good data sets because the Academic Potential Project Model has been in place for so long. We have been very successful. We have good data sets that suggest kids are going to be successful. Because they’ve been supported and nurtured and their talents have been acknowledged, their efficacy is greater. All of those other research-based practices and outcomes, they are met because we care for our students, and we are having them define their talents in a system that’s not always congruent with that. So that, I think, that is the way we’ve been able to navigate a lot of that. Students of color, minority students taking AP IB exams and succeeding with more kids with fewer resources division wide. Seventy-seven percent of our students who took an IB exam pass. Most of our schools, our IB schools, are some of our schools with the highest poverty. For me, that’s encouragement. The data help us to continue that message, and I think, again, my response being that’s where we need to continue to develop, to reflect on the successes, and how we have achieved those successes, because not everyone is aware of that. Our AP exams, we had a 72% pass rate with 16,000 kids and 38,000 exams. Again, a lot of them
being minority or ELL students.

This connection between data and the building of a college pipeline was expressed by one of the Gifted Resource teachers, Participant #2:

So things are changing in that light and that’s why it’s growing because people are seeing that the data is showing – because I notice that every year our district’s Gifted Education Coordinator shows us the data and the increase being accepted into colleges. They’re doing honors work. They’re successful. So, it’s been a process since 2001. Think about it, it’s 2016, going on 2017, so almost 20 years later in this process. This is how long it’s been taking the mindset to evolve, if you know what I’m saying.

Participant #2 spoke of the importance of data in their multiple criteria identification process:

Yes, so we have a holistic approach. It’s not, “Take the test. You’re in or you’re out,” as I referred to earlier on in the interview. I was saying that we’ve had just a total mindset change in thinking about the needs of the 21st century learner—especially from underrepresented populations. And what we do is—one way to help us identify is when the GTRT, such as myself, goes in the classrooms and I collaborate with the teachers and I do a lesson or we team teach or I do a Socratic seminar, the teacher is taking anecdotal records, and I am, too, mentally, and sharing those with the teacher, and we also look at students’ work samples, so what are they showing in the notebooks? We even have problem-solving in math. How are they engaging? We have cognitively guided instruction here at this school, so it’s really emphasizing the students showing their thinking and
different problem types as opposed to just seeing algorithms. It’s really helping them with their flexibility in thinking, so I would say the main criteria is having those conversations, keep bringing those kids up, looking, you know, and I look—

Also, I have a database here at school where I have every single student’s ability test score in my computer, and also their standardized test, end-of-year standardized test called SOL. So I look for advanced scoring in those so opposed to just only looking at ability tests, let’s say a 4th grader. They might not have had a strong ability test, but, boy, they are passing “Advanced” in their end-of-year standardized test. Well, certainly, I’m going to be looking at that, and then asking the teacher, “How is So-and-so doing?” and make observations when I go into classrooms, and then I can see. And like I said, we also have our formal screening where we sit down with administration, and the classroom teacher, and there is a rubric, so instead of the classroom teacher just saying, “Oh yeah, I think they’d benefit from Academic Potential Project.” Nope. There is a matrix that really gets more in-depth questioning about the exceptionalities that the student is exhibiting in different areas. So that data is very, very helpful, too. Yeah, so it’s a holistic approach in that light

Several other participants, both at the district-level and school-level mentioned the coordinator’s use of data, and their own increased effectiveness as a result of incorporating that strategy into their program implementation and instructional practices.
Perceptions of the Impact of Policies on Underrepresentation
in the Suburban District

Federal Policies

Although participants reflected on the impact of federal, state, district and school-level policies on the gifted education practice in their district, their responses suggested they perceived the impact of some recent federal policies was to create barriers rather than support for high ability students from groups typically underrepresented in gifted education programs. Referencing Public Law 107-110 known as No Child Left Behind Act (NCLB), one of the Elementary Gifted Educational Specialists, Participant #10, stated:

*No Child Left Behind* got people off track a little bit. In the whole, you know, "Let’s look at just these scores." And people forgot to look at other areas, or were forced to look at other areas that not necessarily would support talent development. That would be more of a federal thing, I think, that put us off track a little bit.

A principal, Participant #9, described her perception of the impact of federal policies in terms of the Title I Program:

I don’t know how to answer that other than looking through the lens of Title I. I think that’s always the rub for Title I schools—that you keep the state off your back, so to speak, in terms of accreditation by your performance on the test. And they’re not looking for high-level thinkers. They’re not looking for creativity. They’re not looking for any of that. They’re looking for a passing score on that test.
In some ways, it’s that leap of faith that, by accelerating kids and giving them these different opportunities, they’ll still be able to do well on those tests without all that test prep, which I would say we were completely guilty of my first couple of years here. I think, for me, that’s the federal piece that weighs most heavily on me, but I think that we’ve been given a lot of flexibility, but if our test scores dip, then some of that flexibility will go away. So there’s always that, like I said, a leap of faith that giving kids these opportunities, they will be able to be successful on the test, but it’s always, come spring, there’s that, “Oh! They have to do well! I hope they do well!” because as a Title I school, there are repercussions if they don’t do well.

The majority of the participants’ perception of the federal impact on the Gifted Education Program, in general, and the Academic Potential Project, in particular, was primarily around issues of finance or accountability. A principal, Participant 9, mentioned the impact of Priority Status on their efforts. While she stressed the need to get scores up to federally required levels, she saw the status as an opportunity to make big changes due to the sense of urgency:

When we were a Priority School, we had to get our test scores up, and there was enormous pressure on that. Once we came out of that Priority School status, it really gave us the flexibility to try things that I think teachers, in general, have been really excited about...because we were a Priority School, there were things that had not been happening instructionally here that should have, that were happening in other schools for a number of years – guided reading in the upper grades beyond primary grades -- things that were pretty basic that, I think, helped.
That Priority School status gave the sense of urgency in terms of the work, and making changes. It wasn’t just me coming in new saying, “Oh, we have to make these changes.” We had been identified as a school, based on our data, that had to make changes, so I think that helped.

Several participants, including an Elementary Gifted Educational Specialist, Participant #10, mentioned the federal Javits grant funding as a positive outcome of federal policymaking:

Then there’re also the policies of providing grants, like the Javits grants, so that the model is being implemented and used in the New England area. It’s huge because you have that federal funding to support closing the achievement gap—to support all students, basically.

The Every Student Succeeds Act (ESSA) signed on December 10, 2015, by President Obama, represents the most recent iteration of the Elementary and Secondary Education Act (ESEA) signed by President Lyndon B. Johnson in 1965, a year after the Civil Rights Act was passed. The new law linked access to Title I funds to academic standards and assessment requirements (Tanner, 2013; The Education Trust, 2004). This change was viewed as having positive potential for the Suburban District’s gifted education program as reflected in the comments made by one of the Gifted Resource Teachers, Participant #6:

The federal Title I money is really important to principals to be able to have a little leeway in hiring, for example, for a Gifted Resource Teacher to be full-time as opposed to half-time, or buying materials that help support the program. I think
that’s really important. I wouldn’t want to see that go away.

The district’s Gifted Education Coordinator echoed this positive view of recent changes in federal funding policies:

On the federal level, I think with the reauthorization of the Elementary Secondary Education Act, I believe it said that Title One funds could be used, not only for strugglers, but also for students who have potential to succeed at high levels. I don't know the exact language, but something was said in that that has allowed the Title One office now to pay for a full-time Resource teacher. As I said, we give every school a half-time Resource teacher, and then the Title I schools can use Title I money to buy a full-time Gifted Resource Teacher. That's one big change, because that used to not be the case.

An assistant principal, Participant #11, noted, however, that despite the challenges presented by what she perceived as the lack of federal support for gifted education,

Virginia’s state policies still were better than most:

Well, considering the federal government doesn’t even really have a true definition of how they want us to define gifted, that’s an issue. Number 2, they’re only giving money to the Jacob Javits fund, which they only re-funded that—Was that 2 years ago? And that was after a hiatus for how many years? So, in my opinion, the federal government’s commitment to it is the biggest joke ever.

But…It is what it is… So that has been a major factor, I feel, because, if the federal government doesn’t see value in gifted education as evidenced by the fact that they barely even support anything for gifted, I think that it is hard for people across the United States to see a commitment for gifted education. Then, also, I
think it goes back to people viewing it as elitist, and it’s certainly not. It’s kids with special needs. And so, the fact is, we’re very lucky to live in Virginia, and have a school system in Virginia that supports gifted education. The fact that we have to have gifted education is so much further ahead than so many other states that don’t require it at all. And…The budget tells you everything about policy.

She went on to compare the benefit of Virginia’s policies to her experience working with a student who had relocated from another state:

You know it’s funny. I was screening someone from California. The California file said—This is like 3 years ago—It started, “Congratulations.” It actually started, “Congratulations,” for goodness sake. “Congratulations, your child has been found eligible for the Gifted and Talented program, but unfortunately, your school has no funds, so there won’t be any programming.” [Aghast laughter] I tell you, I wonder if that person got fired for writing that. But I actually saved that letter for when I’d get a phone call from a parent irate about something, and I would look at it and just think, “At least we have programming.”

**State Policies**

**Multiple Criteria.** Others seemed to find the Virginia Department of Education’s gifted education policies to be a positive support for their district’s efforts to reach students from underrepresented populations as well (“Gifted Education,” n.d.). For example, an Elementary Gifted Educational Specialist, Participant #3, stated:

Well, I think I can speak a little bit more to our state policies. I know Virginia encourages the portfolio approach and does not rely solely on test scores, so having that as a background for our screening processes, I think it supports the
identification of previously underrepresented groups. I know not all states, but many states, do include the testing as their only criteria for identification and programs, and Virginia does not, so I think that supports the Academic Potential Project model.

One elementary principal, Participant #7, described how they implemented the Virginia’s multiple criteria identification policy, and the strengths-based, case study approach utilized in the Suburban District:

During the school year, we’re really looking to make sure that we’re identifying who we believe have an area, or multiple areas of strength, and that we’re advocating for them. Also in our school community, we work with parents and staff to help them recognize how we advocate for children—whether they be our own children or children who are here at school.

Another principal, Participant #12, supported that idea:

So I think really engaging in the school community especially with staff in understanding how all students have strengths as learners, and how understanding that then helps teachers think about students’ strengths in a broader way.

Participants provided their views of how that multiple criteria looks in practice, including rigorous curriculum, and the impact of one tool that several participants spoke of as vital in their work, the Gifted Behavior Rating Scale. A Gifted Resource Teacher, Participant #12 stated:

It’s something that we call the Gifted Behaviors Rating Scale that we use in Gifted Education. It’s always known as the GBRS. [Pronounced “Ji-bers.”] That’s the acronym that it is referred to as. Yes. And it looks at exceptionalities in four
areas: “the exceptional ability to learn,” “the exceptional application of knowledge,” “exceptional creative and productive thinking,” “exceptional motivation to succeed.” And that’s a big piece, too. So all of those things are looked at when identifying our Academic Potential Project students, and we take it very, very seriously.

Some participants pointed out the value of the Gifted Behaviors Rating Scale as being linked to providing curricular opportunities for students to demonstrate their ability to reason at high levels, and multiple criteria. The assistant principal participating in the study stated:

So if you’re not allowing kids access to critical and creative thinking, to times where they can show their creative talents, or their leadership skills, then you’re doing them a disservice, and putting them at a disadvantage for being able to show those examples in the classroom on a consistent basis. So the Gifted Behaviors Rating Scale is a wonderful approach, but you have to make sure the teachers are giving a fair access to being able to get to that point. We also have parent nominations, teacher nominations, and even student nominations where students can advocate for themselves as part of the process. And then we have work samples, awards certificates…so it’s nice. I know we were one of the few school districts for a very, very long time that used a multimodal approach to screening—And everyone has access to the CogAT or Naglieri tests, versus some school systems where they only give a test to those who they feel might do well on it. So I feel that that’s opened more doors for children.

One of the principals, Participant #9, concurred and reiterated the imperative to provide
students opportunities to demonstrate higher-level thinking:

I think there are multiple layers to that. I think a piece of it is, when we’re looking at identifying students, I think at a policy level, at the districtwide level, it really is that belief that you’re looking at potential, and so I think one of the challenges is, if you have very weak core instructional practices happening, and kids are not given the opportunity to participate in higher level curricular options, then the teachers may or may not see that potential if they’re doing just very low level things.

Several participants pointed out the importance of ensuring that General Education teachers were trained to use the Gifted Behaviors Rating Scale in order to effectively document students’ gifted behaviors, for the process of using multiple criteria to work. An Elementary Gifted Educational Specialist, Participant #10, conceded that some teachers struggle with the flexibility that multiple criteria provides:

Then for the identifying of the Academic Potential Project students, we talk to them about kind of erring on the side of inclusion -- that you’re looking for students, like we say, need the three A’s. They don’t have access. They don’t have advocacy. They don’t have affirmation...They’re from a single parent family. They’re from a minority background. They show great potential...Sometimes it’s hard for teachers of the Academic Potential Project students to see. "Oh, I want a checklist," they say.

**Differentiated Curriculum.** Participants noted the alignment of the Suburban District’s curriculum and professional development with the Virginia guidelines for appropriately differentiated curriculum to accommodate acceleration (Gifted Education, n.d.). The
benefit of research-based curriculum required by Virginia, was echoed by one of the principals, Participant #14 stated, “I think some schools, like The College of William and Mary, are leading the charge. You know, they’ve created a lot of curriculum. I think the state of Virginia is light years ahead of many states.”

An Elementary Gifted Educational Specialist, Participant #10, noted:

   State-wise, I would say, the policies of making sure that we offer differentiated curriculum; and that we are making sure that our services encompass our population. It’s more of a movement than a policy, with cultural competency, tolerance…Just being aware of it has made a big difference, I think.

   Mandate to increase participation of underrepresented students. The district’s Gifted Education Coordinator also thought the state policy requirements were now more beneficial in ensuring that districts develop a plan for identification and support of African-American, Latino, Native American and/or low-income students in gifted education:

   As far as the state level goes, the only thing I could say is the fact that in the State template for the local plan, it includes, “What are you doing to address underrepresentation?” Like I said, we actually include our Academic Potential Program as a strategy for how our underrepresented minorities will increase in gifted programs.

Local Policies

Duke (1989) in an examination of the effect of school policies, rules, regulations and procedures on minority students, asserted that, “the policies that exert the greatest impact on the lives of students tend to be those that are developed locally, rather than at
state and national levels” (p. 17). Duke would have found agreement among this study’s participants. Although most participants perceived federal and state policies as having impacted the gifted education program in the district to some degree, the majority of responses suggested local policies have led to the most significant benefits in efforts to identify and nurture students from populations underrepresented in the district’s gifted education program. Participants expressed a clearly articulated, shared sense of purpose, and perceived local policies, on both the district and school-level, to have had the primary positive impact on increasing the district’s ability to identify and nurture high ability students from underrepresented groups. Their responses suggested this impact to be most clearly recognized in the areas of identification and service delivery for student talent development, leadership development, professional development, and funding.

Sub-categories are Shared interpretations, District-level policies, College and Career readiness, Professional Development, Principal Leadership, and Outreach to Academic Potential Project Parents.

**Shared interpretations: Access, advocacy, and affirmation.** There was overwhelming agreement among participants that closing the opportunity gap and providing equal access, and creating a college pipeline for Academic Potential Project students were central goals of the efforts made by the Suburban District through the Academic Potential Project. Two Gifted Resource Teachers had this to say regarding closing the opportunity gap:

Participant #4: Well so, as far as the model itself, the idea that teachers collaborate to identify, nurture and provide special opportunities for students from underrepresented populations. We are providing them with extensions and
enrichments that go above and beyond the regular curriculum. Giving them hands-on activities that will provide them with experiences because I think that many of the students are lacking in experiences and have a lack of prior knowledge that many more affluent students have so that’s what we’re trying to do and we work together to make that happen.

The respondent continued:

So...But so, again I say, 20 years later, the school system itself is being very, very progressive in recognizing and getting that message out there that everybody needs equal access to these things, you know, as necessary. So, that I think that as the country is moving forward in recognizing that the demographics of the country itself is changing, then we need to up our standards because this is our next workforce...My principal just gave us a very good quote. She said “there’re a lot of people in the world who are full of potential, but very few people have the opportunities.” And that’s kind of what I would say about Academic Potential Project students. They’re the children with enormous potential, and then we come in and provide the opportunities and that is what makes the difference.

Participant #5: A lot of that is through the critical and creative thinking lessons that they want them to do, but a lot of that is just recognizing that it’s not really fair to compare a student to another student just because they’re the same age when one may have had three years of preschool and the other had nothing, or one had access to thousands of books and the other, maybe, didn’t. We really want to say, "Look at your student like they’re a blank slate. Recognize where they are, and then realize they’re going to grow, and they’re going to show that growth and
help them get on the journey.

Participant #7, another principal, had a pithy response regarding equal access and closing the opportunity gap was, “Well…I tell you from my standpoint it’s because I really believe in kids, and I believe in trying to level the playing field, and trying to make sure that we are providing all kids with different opportunities.”

**District-level.** There are also district-level policies believed to be unique to the Suburban district developed to support students at the secondary level. For example, students receive an Academic Potential Project designation that follows them throughout their school careers. This allows counselors and other school-level personnel in middle and high school to know that this student may need to be considered for more rigorous coursework. The other policy was developed to remove barriers to participation in IB and AP classes. The Secondary Gifted Education Specialist, Participant #8, stated:

A policy that we have in place is a strategic goal around the incorporation of all students in the county to take at least one AP or IB class course during their academic career in high school. So to get there, to meet that goal, we have to work backwards a bit. Students are less likely to take AP and IB courses as juniors if they’ve never taken an honors course leading up to that point. Individual counseling sessions with students is an accessible way that we can have those conversations very early, so that’s an activity.

Linked to that is their commitment to pay any fees related to taking the AP exams. He pointed out the district’s commitment to ensure that the cost of national tests at the culmination of courses is not a disincentive for students’ participation.

Funding for us for open access is critical around paying for all the students’ AP
and IB tests. That’s an easy one to cite. We know that kids are not going to take tests that they might be capable of succeeding on if we don’t put a dollar sign in front of them and say it’s not an issue.

He went on to explain another budget related policy that has been instituted on the secondary level that has to do with grants to schools and teachers. Recent policy changes require that grants must be linked to nurturing potential in Academic Potential Project students:

That was just last year that we connected the grant funding to the support of the Academic Potential Project. School and teachers, leaders had to justify -- They’d been getting the money for years, but we’ve never included, specifically, the role of nurturing the potential of these Academic Potential Project students, so we’ve made that a direct, explicit connection. Those are three specific policy changes, and I will use that word intentionally, changes that we have made as a result of becoming more strategic and smarter about how we are connecting our funding and our support with the use and encouragement of more awareness in education of our Academic Potential Project students and their support.

**College and career readiness.** One practice-related question that all participants were asked from the semi-structured interview protocol was, “What are some reasons that might explain how Academic Potential Project has survived and grown in since its inception?”

Most responses referenced the data supporting the achievement of Academic Potential Project students framed in terms of college and career readiness goals. The idea of ensuring that students were positioned to take honors, Advanced Placement (AP) and
International Baccalaureate (IB) courses was described as a goal from the beginning of a child’s school experience.

**Developing a cohort.** Several participants mentioned building a cohort for Academic Potential Project students as an intentional effort to give participants a sense of belonging and the ability to see themselves as scholars. One principal shared the story of her husband’s hesitancy to allow his sons to participate in the gifted education program due to his own negative experiences with solo status as an African-American male in gifted education when he was a child. She pointed out the diversity in the Suburban district’s program gave him the confidence to allow his children to participate. Her story suggested the potential for this intentional effort to build a cohort among Academic Potential Project students to reap positive benefits not only for Academic Potential Project students, but other Level IV students as well. As stated by Participant #3, one of the Elementary Gifted Educational Specialists:

> Identifying students so that they have a cohort of students who are like them, who are smart, and working hard, and thinking about school in a positive way, will help them as they move from elementary through middle and high school… in my schools, the students that are in the gifted classes look and sound like each other. My school is predominately Hispanic, almost 70%. That’s the ratio of students that are in those classes. I think it helps them feel that they are with other peers that have the same backgrounds and experiences. I think that’s important that we really try to address all the components -- the emotional, the cultural, the social -- Start it early and then give them support throughout middle school and high school as well.
An elementary school principal, Participant #7, concurred:

Well, I think it’s bringing kids together to have a conversation with each other that doesn’t always take place, right? I think it’s a certain motivation. I hear kids all the time who will say, “I’m an Academic Potential,” or “I’m working towards being an Academic Potential,” so there’s definitely a sense of building up that perception of yourself.

One Gifted Resource Teacher, Participant #4, shared her observations of change over time:

In 2001, when I started at this elementary school— I’ve been working here 16 years—there was a small Gifted Education program. Maybe that was the model back then because you only took a small percentage of students to work with the Gifted Education teacher. Although they were in a high minority school, they were mostly White or Asian students. When I first started working, I got my list of students, and there were about 24 total in a school that I was going to work with. And like I said, they were mostly majority or Asian students. Then, the year after, we started our Academic Potential Project program. Now I have about 150 kids in the gifted education program, the majority of them—by majority, I mean about 90% of them—of those kids are Academic Potential Project students.

Which is interesting.

She considered for a moment.

But not that interesting because it’s really a reflection of the school population. It makes sense. Our school has a high majority minority groups, so we have a majority of Hispanic students in our school, and then Black, and then White,
then a small group of Asian. So, the program that we have here actually reflects the demographics of my school—which makes sense. I was [previously] in a school with 60% minorities and none of them—well, maybe one or two, were of that demographic in the program, so this is across the board. This is what you’re seeing across the Suburban District. We’re raising that up. More and more students – minority students, are being eligible for Gifted Education when in the past it was Whites and Asians. Now we’re becoming more reflective of our population. That has been slow. That has been a slow growth because, as I said before, you’re shifting paradigms. Now people have to see things through a different lens, but luckily for that holistic screening process, that’s helping to open those doors. So it is happening, and it is happening gradually, but steadily. And it’s a wave and it’s going to continue.

Another Gifted Resource Teacher summed it up, “What we have found is when they are with peers of like ability, they tend to soar, so it is very important for us to make sure they have peers that are of like ability.”

*Building a college pipeline.* Participants spoke of a focus on both short and long-term goals for Academic Potential Project students with a clear view of the Academic Potential Project as important to a college pipeline for participants. One Elementary Gifted Education Specialist, Participant #13, pointed out:

They’re taking honors classes. They’re taking AP class. They’re trying algebra.

Then going on to college… We have a short term and a long-term goal. The short term is giving them an opportunity; letting them have summer school; having after school programs; working with student leadership academy. That’s a short
term goal. We’re giving them that opportunity. But then long-term goal is that they’ll participate, like I said, in the honors, AP, and then eventually go on to two year and four year colleges.

A Gifted Resource Teacher, Participant # 5, expressed the idea of a short-term and long-term goal as well:

We realize that our long-term goal is to prepare our students for academically rigorous and challenging course work in high school, which will, then in turn, help them get ready for post secondary experiences. We know that that’s the long-term goal.

**Student support during transitions.** Key to the support of a college pipeline for students is attention during critical transition periods such as the transition from elementary to middle school and again, from middle school to high school. One district level policy that has supported students during this transition is one that allows students to self-select for participation in honors and AP classes. One elementary principal, Participant # 14, observed:

I just know that they do group students in classes, so a lot of Academic Potential Project students have access to Honors courses and…whereas before you had to either test them or, be recommended by your 6th grade teacher, and so all the work that the elementary teachers did through the years may be lost without the support of that 6th grade teacher because the 6th grade teacher created a matrix along with the Gifted Education teacher to identify who needed to have advanced courses, and now those students have access to those courses immediately.

As previously discussed, data is an important tool used by the district’s Gifted
Education Program personnel for program development and student advocacy. Attention is given to data during these critical transitions as well. The Secondary Gifted Educational Specialist described the transition support:

Another activity is doing a handoff of Academic Potential Project students in an articulation fashion between elementary, middle, and high school. When we see that there are 300 students who are taking, let’s call it honors English in middle school, and then 150 are taking honors English in high school, what happened? So the Academic Potential Project students, essentially we have someone to help monitor their access and their role in taking Gifted Education courses. They have an advocate. They have an AP/IB coordinator. They have a school counselor. They have a director of student services. They have a staff member who is aware and understands the importance of getting those students into a Gifted Education class, whether it’s an honors course or an AP or IB course. The criteria for selection of Academic Potential Project students Model students are what are the three A’s that we would say, “Does the student have access to an Gifted Education course?” Well, if they don’t have access because someone’s not advocating for them, then who’s advocating in the building? And then if we say here’s an Academic Potential student and they’re not in an honors course or an AP/IB course, why?

One of the principals, Participant #9, stressed the importance of parental involvement during these transitions:

For me, I’d really like to see—the reality is, getting a kid on a track for acceleration in middle and high school starts with us. If they’re not ready to be accelerated and take at least Math 7 Honors, at least by the time they get to the
middle school, or even potentially Algebra, it’s really hard for them down the road to look at some of those advanced offerings in math and science. And I think sometimes—our district’s Gifted Education Coordinator completely gets it—but I think others in the leadership realm maybe don’t see that connection. They look at that participation and they aren’t looking at the way we impact, and then the middle school and then the high school—kind of those transitions between. It would be really easy for our kids to not handle those transitions if they don’t have parents who are saying, “No, Sweetie, you’re taking all honors. All four classes. You can do it. Yep. And here are some supports for you.” Then that transition into the middle school, into the 9th grade high school can be a challenge for our kids. We’ve had parents that we’ve had to counsel around math that the child picked just regular old Math 7 and we’ve said, “Oh, no. They’ve already taken Math 7 with us. They were successful. They passed SOL. They’re ready for this,” and not understanding the implications for that, just taking regular Math 7 when you had a kid who has already been successful in Advanced Math here, in fact, has taken the Math 7 SOL and passed it, so then the long-term implications, and educating parents about why this is important, and how to help them and support them in advocating for their kids, particularly, around those transitions; and if parents don’t feel comfortable or are not serving in that role relative to the school, ways that the school can fill in that gap and advocate for those kids as they transition on.

The respondent continued:

But also, think of the spectrum, too, that Academic Potential Project students are
K-12. It’s important that we help our middle schools and our high schools, also being aware of who our Academic Potential Project students are, and how they can support them. Again, it comes to leadership, and then also choosing those rigorous pieces of curriculum [and encouraging students who say] "I can’t take that honors class!" with "Hey, try this. I think you can do this."

One of the Gifted Resource Teachers, Participant #13, further explained the direct link between the instructional efforts in elementary school and the impact on the transition to middle and high school:

One thing we’re trying at the lower level is to expose the children to higher math because that seems to be one of the issues when they get to the point of applying to our district’s STEM Magnet School, they need to have that higher math.

Closing the achievement gap. Districtwide, support during these transitions is seen as critical to closing the achievement gap and the Gifted Education Program office has been identified as central to accomplishing this goal. The Gifted Education Coordinator their assignment in the project:

The Suburban District did the Closing the Achievement Gap Project. You can probably find it on our website. It has six drivers. Access to rigor is one of those drivers. That's the driver my office is in charge of. Academic Potential Project is a big piece of that driver. What we're doing this year that's different, actually, we've identified an elementary, middle and a high school in one pyramid. That means they all feed into each other. We developed a project team. It's the people in my office working with three key people from each of those schools that the principals identified. It's a guidance counselor, it's a Gifted Education Resource
teacher, and it might be a director of student services at the middle or high school, an instructional coach.

Each principal gives us three names. We have three from the high school, three from the middle and three from elementary. That's nine people from the schools, and then we have nine from my office, elementary, middle and high. We're meeting as a project team. We're directly going out to those schools. We're saying to them, "These are the actions that we think you should be taking." They're giving us feedback, "This is working, and this won't."

We're working strategically with this one pyramid, the idea being as we do that work this year, what we've learned, we're going to create a way of sharing what's working and what actions make a big difference. We're going to scale it up next year.

She shared her perceptions of the Academic Potential Project’s effectiveness:

Even though we're making a difference with Academic Potential Project students across the County, we know that we could even make a bigger difference, especially as they go into middle and high school. Kids often fall through the cracks. We don't want that to happen. This project team is doing some critical work this year. We're just finding that by partnering with the schools and meeting with them ongoing, and going out and listening to them, that's another way to strengthen what we do.

Budget policy. Funding challenges were discussed, but also the demonstrated commitment to the Academic Potential Project represented by funding decisions.

Participants also expressed their hopes regarding future education and funding.
commitments. One Gifted Resource Teacher, Participant #13, for example, shared how even when summer school was cancelled for the district, the budgetary commitment to the Academic Potential Project’s field trip remained.

You know, I have to say that we’re fortunate that we have enough funding to have the classrooms every year, but, unfortunately, due to budget cuts, we have not been able to give classroom teachers—Academic Potential Project summer school teachers – the books that accompany the units; so, that’s the one thing that I think has definitely gone down a little bit, but the positive thing is that each Academic Potential Project class has been afforded a field trip every year still, so that hasn’t gone. I guess the policymakers understand based on what we’re sharing with them the importance of the program because still the fieldtrips are funded, which is great.

Another Gifted Resource Teacher, Participant #4, pointed out the comparative benefit of investing in the Academic Potential Project versus allowing students to fall through the cracks:

Frankly, I think we’ve done a lot with very little, and we’ve gotten used to working on a shoestring budget, but I don’t think the government, I don’t think our state government realizes the impact that this has and the potential impact that this has. I mean, we may spend money on minorities in prison, and rehabilitation programs and in terms of drug rehabilitation, and so forth and so on, and we see them in that light, but what if we could change that perspective and show them that if we start early, we won’t lose these kids as they become adults to those other systems. Those kids that we see as 5 year olds and 6 year olds will have the
potential to go to college, to have productive careers, to have healthy, happy families, so if we are given the monetary assistance and backing to do this important work now, that would save them, taxpayers, millions of dollars in the future when those kids fall through the cracks and they’re not inspired to do more with their lives. I really think that the government doesn’t have an idea of the potential impact that what we’re doing with these children is all about.

A Gifted Resource Teacher, Participant #6, from another site echoed that perception: I just think that it’s important that state and federal policy explicitly support the whole question of underrepresentation, and not just with words, but also with money.

**Professional development.** Professional development was described as serving several purposes in the Suburban District’s gifted education program. Teacher capacity-building is prioritized through training in the use of academically rigorous curriculum, and cultural competency.

**Endorsement requirement.** In the local university’s evaluation of the Suburban District’s gifted education program, it was noted that it exceeded the Virginia requirements in several areas. One area is the district’s endorsement requirement. Responding to questions about this endorsement requirement, the district’s Gifted Education Coordinator stated: I'm glad you asked that, because that's a policy issue. We actually created a regulation here in Suburban District, probably about 10 or 12 years ago. We created an in-house regulation and we added to the Suburban District regulation...saying that in order to teach gifted learners, you have to have the
endorsement within five years if you're going to be a full-time teacher of advanced learners --that means if you're in a GT center, or if you're a resource teacher, or if you're in a middle school and you teach full honors or the GT center in middle school. What we did was we replicated the Virginia endorsement here in Suburban District. The Suburban District has an academy, so we decided to offer the same courses that Virginia offers through the county, free to teachers. We offered *Introduction to Gifted, Curriculum for Gifted, Differentiation* -- all the endorsement courses. Teachers can take them through the academy for free. We say, "You can either get your State endorsement on your license, or you can get a Suburban District endorsement, which is academy credits. You have to get it within five years."

She freely admitted the limitations of the policy:

That regulation has no teeth, because it's not a State regulation. Our principals and everybody's adopted it, and our teachers work on the endorsement. The parents really like that piece. They really like the fact that somebody that has the background is teaching the teachers and education to work with advanced learners. One of the requirements of the endorsement is you can take enough inservices to equal 45 professional development hours. Those are in areas like William and Mary Language Arts, Social Studies-- It's our curriculum framework. If they take training in our curriculum framework, they can get up to 45 points toward the endorsement that way too. We have a separate one for elementary and for high school. Over time it's been great. We can really say our teachers are prepared to teach advanced learners. The most popular course is Social and
Emotional Development in Gifted Learners. That's one of the most popular courses.

**Gifted resource teachers required training.** Leadership development is an important goal of the Gifted Resource Teacher’s training as well. They often become peer coaches in their schools, especially in the area of culturally responsive teaching. Gifted Resource Teachers pointed out the districtwide spread of the Academic Potential Project Courses. Two teachers shared similar perspectives. One Gifted Resource Teacher, Participant #5, stated:

All Gifted Resource Teachers, over the past few years, were required to have cultural competency training provided through the Suburban District public schools. It just talked a little bit more about the ways in which different students represent their learning and their giftedness and how different cultures might show that learning or the way in which they interact in their environment...I think it just really helped people look at it through a different window so that they were not necessarily looking for the same types of children. They were really open to more diverse learning. We’ve definitely increased that. Then this year—that was for all gifted education personnel or Gifted Resource Teachers and Level IV teachers—but then this year, it’s required training within the entire county because, obviously, just like” most of the world, our numbers and our cultural representation diversity is increasing each year, and we have to grow with that change as well.

Another Gifted Resource Teacher, Participant #5, described her unique role as one of the facilitators of professional development:
As I mentioned earlier, I teach a class for educators in the county and I’ve noticed that initially when I started teaching the classes, it was mostly Level 4 or Gifted Education teachers. Now I’m getting General Ed. teachers, ESOL teachers, Special Ed. teachers, art teachers, music teachers…There’s been more of an awareness that we’re sort of all in this together, and it takes a village, and that everyone needs to recognize the potential, and where that may come from. It [that recognition] may come from a specialist. It may come from the classroom. It might come from a counselor. I can definitely tell. Right now in my class—I’ve had principals in my class, but I have some first grade teachers, kindergarten teachers, music teachers, the whole ESOL, middle school, high school. A lot. A pretty big range. Their assignments include looking for students with potential, doing a profile as though they were screening them for services, talking about their strengths, and having them actually do workbooks in which they analyze and prepare documents that would help support the student. It’s actually a real life scenario, and my goal is that at least everybody in that class will have at least one or two more students that they are now going to look at seriously for receiving Gifted Education services.

Positive and negative connotations that may be a part of socially constructed knowledge can influence certain types of policy designs. J. J. Pierce et al. (2014) suggested that these policy designs become systemic, and in turn, lend further support to socially constructed knowledge (J. J. Pierce et al., 2014). An example of the impact of a positive connotation of constructed knowledge is evident in the descriptions given in the preceding statements regarding the decision by the Suburban District district’s leadership
to require all teachers to take the cultural competency course required as a part of the district’s gifted endorsement courses. The leadership, deeming such a course is a benefit to all of the students in the district, not just those receiving gifted services, institutionalized the course by implementing the policy. In so doing, they are instituting and reinforcing socially constructed knowledge.

*Academic Potential Project course.* Participants often spoke of leadership and professional development within the same contexts. The leadership development aspect of professional development not only included developing instructional leaders within the district, but also to equipping other school districts throughout Virginia and other states to implement the Academic Potential Project model. An Elementary Gifted Educational Specialist, Participant #10, described the endorsement courses she teaches:

We have an online and a face-to-face class. We used to be a part of professional development company, now we’re not. They use one too, so other counties they actually use what we developed. Other counties, other states are using that, but we also have it within our own classroom. The Academic Potential Project class is for Gifted Resource Teachers who are new. It’s for our General Education teachers, admin, anyone K through 12. We have two different versions. We have an elementary version, which is a three-credit class. We have a secondary version, which is a little bit shorter. It’s a one-credit class in which you, first of all, you look at the [student’s] work, like I said before. You look at the work of different case studies up and around. You use the handbook that we’ve created. You look at your own school. You, basically, are learning all about who the Academic Potential Project students are. You’re learning about the GBRS. You’re learning
about making thinking physical; using creative and critical thinking; showing examples of other students who are a part of the Academic Potential Project. We have a video of one particular student, who is an Academic Potential Project participant, who talked about being able to get out of what they call the highway, because people intervened in his life and put him on a different path…We talk about the model. We watch videos of Academic Potential Project in action—at the summer school piece. We look at—in the classroom. They look at models that nurture advanced potential. So again, going back to that concept-based instruction. Using the big ideas, macro and micro concepts. How to nurture your Academic Potential Project student once you’ve identified them.

Culturally Responsive Teaching. Culturally Responsive Teaching is a critical aspect of the Academic Potential Project’s professional development. The same Elementary Educational Specialist, when reflecting on her time as a classroom teacher stated:

As a classroom teacher, the activities that really helped me as a teacher were basically those related to becoming aware of underrepresentation within gifted classrooms. The Gifted Resource Teacher at our school site gave professional development on finding and identifying Academic Potential Project through creative critical thinking lessons. Then, really with the Gifted Resource Teacher helping us to be more, I guess, more culturally responsive, it helped us to differentiate the curriculum. That was really powerful. I think the students then were able to rise up. As you present more rigorous curriculum, give them that opportunity, the students are able to rise up and meet that challenge. You’re still
filling in the gaps with basic skills and such, but they’re able to hit those areas strongly.

Gifted resource teachers as peer coaches. Professional development is also perceived to be a leadership development tool in the district by all participants. In particular, the Gifted Resource Teachers’ required training was noted as critical to the peer coaching and program advocacy. One Gifted Resource Teacher, Participant #6, who had been in the district since the Academic Potential Project’s inception, noted the following:

I think they’ve been effective because...I think it all starts with awareness and, you know, when you know better, you do better. Gifted Education Resource Teachers all have to take Academic Potential Project courses now. They didn’t have that. They didn’t have that when I first started as a Gifted Resource Teacher, but from the moment the Academic Potential Project began, the district’s Gifted Education Coordinator had Academic Potential Project meetings for Gifted Resource Teachers and constant training and awareness-raising for us.

Another Gifted Resource Teacher, Participant #2, stated how she saw creating awareness among her peers as central to her responsibilities:

So in addition to the summer program, and meeting with parents, it’s very important that I, at the beginning of the year, especially with new colleagues, share the importance of the Academic Potential Project and the rich history of the Academic Potential Project in our school.

The District-level Gifted Education program’s policy shift from the pull-out model to a collaborative teaching approach to service delivery, as well as prioritizing of principal
leadership development has impacted how principals perceive the role of the Gifted Resource teacher in their schools. One Elementary Gifted Educational Specialist stated, “I think what also makes it really great is that professional development for the Gifted Resource teachers; then the turnaround for the teachers at the school.”

A principal, Participant #9, spoke to how the Gifted Resource Teacher benefits other teachers in her school:

We have a coaching model here where every classroom teacher is assigned a coach. New teachers, which are also teachers in their first 3 years of teaching, every single week they have an observation and a debrief. The more experienced teachers, they’re on a coaching cycle, and so on a quarter, off a quarter. Teachers make decisions about what they want to focus on with their coach, and what has been very helpful in terms of really looking at supporting teachers to implement some of this curriculum is our Gifted Education Resource Teacher is one of the teachers that is a coach. So essentially, over 50% of her time, she’s coaching other teachers, and so what that allows is—we had her start with some of the early adopters, the ones who wanted to try out some of the William and Mary units, Socratic seminar, or DBQs [Document Based Questions] or any of those curricular options—wanted to try it out with the Gen. Ed. setting. Those were the people we assigned the Gifted Resource Teacher to, to be able to support. So, that, then, allowed them to talk to the whole staff when we’d have staff meetings about what they were doing, about their kids…They were very good about inviting people in. “Okay, we’re doing our Socratic seminar today, come by with your class and see what we’re doing.” It created that sense of excitement. And so
having a Gifted Resource Teacher—I pay to have her full-time because I think it’s important to what we’re doing, and I think that that coaching piece, so teachers don’t feel, “Oh my God. I have to learn this whole new curriculum on my own.” You can have someone come in. She can model it for you. You can co-teach it. You can try it out. She can give you feedback. You decide as the teacher what your comfort level is with trying some of these new curriculum options and then you have support with that. Because I think, it’s not that people don’t want to do what’s right. It’s just that they have a lot going on, and so, I think that that coaching piece and having the Gifted Resource Teacher in that role has really, I would say, has probably been the biggest thing that we have done to help mitigate some of those challenges.

Participant #9, a Gifted Resource Teacher, however, stated that the expectation that she coach peers and model critical and creative thinking lessons sometimes presents challenges:

Well, I would have to say that from my role as the Gifted Resource Teacher, my biggest challenge when I first started this position was just ensuring that my colleagues understood the importance of the program and having the integrity of the program. So it’s not just saying, “The student can benefit, yeah, yeah.” That’s why there are pieces in place, such as that matrix, to really hold on to the integrity, to focus attention on the behaviors that are exhibited and really, really be mindful of that. You know, really support the student. Really look at each student. Bring them to the table. So that has, definitely, been a challenge. That’s a real challenge I would say. Being at my elementary school is a little bit different
in that this was the place where it started -- although there have been major staff turnovers since.

**Principal leadership development.** Several participants pointed out the benefit of prioritizing principals in the project’s leadership development model. One Elementary Gifted Educational Specialist, Participant # 10, when reflecting on her previous experience as a Gifted Resource Teacher, observed:

> Of course you’ve seen the model with the circle. But it starts with the leadership. So in my school at the time, our principal was very integral in becoming part of the leadership and saying, "Hey, this is really important. We need to address these needs. Here’s how we’re going to do it. Our Gifted Resource Teacher is going to work with teachers in each grade level." At the time, I was in first grade.

One Gifted Resource Teacher, Participant #6, described the process of principal leadership development and teacher professional development as she had experienced it:

> For example, all Gifted Resource Teachers have to take an Academic Potential Project class and learn about it, and learn about underrepresentation, and, you know, again, it’s the continuous building of awareness. Principals are invited to Academic Potential Project meetings twice a year. I think that’s huge because there has to be principal buy-in. I think the fact that it’s not a strict program -- like you have to implement it this way or that way. You know, the district’s Gifted Education Coordinator would always say, “It’s a model. It’s not a program.” She said from the beginning, it’s up to the principals how they want to have it implemented in their schools. It’s like a vision, like this is what we’re going for. These are the components. You implement it the way that works for you. It just
makes it, you know, flexible enough that schools can make it work for them. That everyone still understands what the end goal is. I think that the Gifted Education Program office does a great job in requiring that the Gifted Resource Teachers—everyone has to take the class, and then providing these twice a year meetings; because, if the principals don’t buy in, then they’re not going to support the Gifted Resource Teachers and their efforts.

An Elementary Gifted Educational Specialist, Participant #10, reiterated the importance of principal buy-in describing what he or she does as impacting everything about the model’s implementation, including the teachers’ effectiveness in implementing a particular curriculum:

When you have a principal and the leadership at the school saying, "Yes, I’m going to send you to this in-service. Yes, you can take a sub day and learn more about how to provide using M-Squared and M-Cubed within your classroom," that’s huge.

Gifted Resource Teachers stressed the importance of principal leadership to gaining access to peers in order to model lessons and collaborate. Participant #6 stated:

You need support from the administration too, to be able to continuously have access to the staff—to keep that awareness going. So that’s just something that always has to be worked on, so it’s not forgotten. Some great things start and then they fizzle out, and I think they fizzle out because, you know, people forget about it, and then it’s always the pressure of everything else.

She described how her principal supports that access:

One of the responsibilities of the Gifted Resource Teacher is to go into the
classrooms and do their critical creative thinking classrooms, and model them, and then share with the teachers…Again, there has to be support from the administration to expect the teachers to use the strategies. For example, at my new school with my new principal—he’s new to this school as well and he’s a really great leader—I would call him a visionary, and so he’s probably going to expect the second grade teachers to use a Project M Squared unit in the spring, you know, with me helping them. His vision is to build teacher’s capacity as well. And that’s the constant thing. We’re always working on building teacher capacity. Then, also, you’re constantly dealing with teacher turnover as well, so it’s never ending.

Also, the participants perceived that prioritizing of school-level leadership development provided more flexibility in implementation. As Participant # 13, a Gifted Resource teacher stated:

Our principal here is very supportive of the Academic Potential program, and she has said herself how effective it has been, even in raising scores because the students are learning. The students are enjoying learning, and I think, in a way, they have a little more confidence in their work.

Another principal, Participant #9, described how that flexibility allowed her to better serve Academic Potential Project students:

What we decided to do was, three years ago, we started a local Level 4 program so that students who are found to be Level 4 eligible are able to have a choice whether they want to go to the center program or whether they want to remain here at our school. The first year, we only had a handful of kids that stayed, and I
would say every year that number has doubled. So more and more families are choosing to have their students stay here. What that has allowed us to do though is to have students who are not Level 4 eligible—who don’t have the standardized test scores to support that eligibility—but we have the flexibility at the school level to have them be able to be guests in the local Level 4 class. This allows us to look at those kids who have that potential and give them some of those opportunities. The kids that we have put into that class as guests have been very, very successful. Some of them have actually, subsequently, gone through that eligibility process again and have been found eligible for Level 4 services, and have chosen to remain here. So that has been another layer for us that has really helped us to support students who, through traditional identification mechanisms, are not picked up, but for us to see some of that potential.

**School-level policymaking.** When asked if state and federal funding affected the model’s implementation at her school, Participant #13, a Gifted Resource Teacher’s reply demonstrated the value of school-level leadership development, and what can happen when a principal is committed to the model’s effectiveness at his or her school. She stated, “Our principal’s pretty creative with her financing because she’s one of the few schools in Suburban District that has two Gifted Resource Teachers.”

Participant #9, a principal, explained how her ability to make school-level budgeting decisions can have an impact on the Academic Potential Project in a school:

So the district provides a half-time Gifted Resource Teacher to every school, and then it’s principal discretion. You have some discretion in terms of you can trade certain positions, and things of that nature, or you can simply purchase with
instructional funds a half-time teacher. There are a number of us in the district who do that because I just don’t think that we would be where we are if we didn’t have the Gifted Resource Teacher we have, and didn’t have her here full-time—particularly around the coaching.

An assistant principal, Participant #11, noted:

Obviously with the funding it changes how you can implement services, whether or not you can have a summer school. In addition to that, what I’d said earlier is, my principal’s always bought me full time. Every single school is given a Gifted Resource Teacher for 2 half-days. If a principal wants to purchase more time, it comes out of the principal’s budget to have a full-time person. So, if I’m a full-time person in a school of 900, I’m going to be able to do my more formalized gifted program, but also be able to work with my Academic Potential Project students on a regular basis.

A Gifted Resource Teacher, Participant #5, expressed how this local budget decision impacted her own effectiveness with Academic Potential Project students stating, “I have an extended contract to specifically work with Academic Potential Project students so that I can provide them with additional support before or after school and support our teachers as well.”

**Outreach to Academic Potential Project parents.** Participants perceived the outreach to Academic Potential Project parents as critical to effective service to the students. One principal, Participant #7, observed:

You know I think we have a lot of parents who put a lot of trust in the school system and don’t feel comfortable sometimes advocating for their own children,
so it’s breaking down those walls as well. We have wonderful conversations with parents about how we are advocating for their children and how they can feel comfortable coming in and advocating for their children. Really talking about what do they see at home. You know, sometimes they’re seeing a spark that if they can tell us about it, we can get to it, too.

When asked what parent outreach strategies are used at her school, she stated:

I think it changes. It just depends. We have several evenings of Information Nights around Gifted, and we don’t—certainly don’t call it an Academic Potential Project Information Night necessarily. And sometimes we’ll have parents who just reach out to us. Sometimes we’ll just reach out with a private phone call with a parent and talk about things.

Another principal, Participant #14, noted:

I believe part of the Academic Potential Project model was not only to challenge them to believe that they are smart and highly capable, but also to nurture that other piece—to care for them, and let their families know that, “Listen, these are some great things I’m seeing in them, and, yes, So-and-So does act out and So-and-So has been pulled out of the classroom for this or that, but let me show you what else he or she can do.” Because I don’t think some of the parents of the Academic Potential Project students have heard some of those great things that are happening. I had a teacher laugh, literally, almost in my face when I went to her classroom to pull a student. She couldn’t believe that this child was an Academic Potential student.

Parent involvement was perceived as central to supporting transitions as well. An
Elementary Gifted Educational Specialist, Participant #10, stressed how outreach to parents may include helping them identify free and cost-effective resources to support their student’s education:

It’s not leaving out that parent piece, so making sure that we start engaging our parents --how they can support those students and how we can support them. I’ve been in meetings with our magnet high school and parent liaisons to Academic Potential parents about, "Hey, here’re some websites we can go to, or here’s some things you could do to just have access to things beyond the school." Like a STEM activity. They don’t usually have, they’re missing that background piece where other parents will be like, "Hey, I’m going to enroll them in these 12 different workshops and camps." We become that for them. Not only through summer school, but also through having those meetings with the parents.

Gifted Resource teachers also had strong ideas about their role in supporting parents. A sampling of these voices is as follows:

- Participant #4: So first we have to work with teachers to help them see the examples that we see, and to open their eyes to that. And then the next thing, I think, is parents. The parents themselves may not realize that their child has these potentials. Or maybe, like in the case of many parents at my school, they’re overwhelmed with just trying to keep a roof over their heads. They’re trying to pay the bills, keep the lights on, have food on the table, and have a winter coat for their child. That’s enough for them to think of. They don’t have the mental and emotional and financial stability to provide them with summer camp, free programs, taking them to the
public library, taking them on excursions like to Jamestown and so forth. They don’t have the wherewithal to do that. So that’s our part to inform parents, that, not only can their child do more, but also we’re willing to work with them to get them there. So we’re informing parents and informing teachers on a daily basis of what potential these children actually do have given the right assistance.

- Participant #2: So I say all of this as laying the foundation for the Academic Potential Project. So that is one of the ways that we show Academic Potential Project parents that they’re valued in our school culture, in our community. So in saying that, building a relationship of trust is important. I have Academic Potential Project parent coffees—just had one recently. I plan on having another one, probably, after the winter vacation, just to ask parents how they’re doing; how I might be a help to their kids at school; but also, how they can be a help to their children at home. Believe it or not, last, with my Academic Potential parents, the result of the meeting was we actually went on a few field trips together. So another activity is to show the students and their families that they’re plenty of things to do to get up and out and about—as far as going to museums, and seeing different things as we live in Washington, DC area—that are free, or very cost effective, but yet can make lasting impressions on their children’s learning. Even looking at the architecture of a government building about town and connecting that with the curriculum. So really making that commitment.
Participant #5: It sort of builds in that support to help them see beyond high school and set goals and so forth. Then, we also try really hard to involve the families. In our school, we offer a lot of workshops for English, a lot of workshops for helping their student succeed. We have weekend field trips and so forth. It’s just understanding where we’re going, but knowing that we need to start really early and that we need to provide supports for those students and help teachers see the potential in those students early on, and help them throughout their educational career.

**Parental support during transitions.** As aforementioned, a shared and clearly articulated college and career pipeline is central to beliefs about the purpose of the Academic Potential Project. Participants expressed a sense of their role on the elementary level to prepare the student for successful navigations of critical transitions—from elementary to middle school, from middle school to high school, and from high school to college and career. One principal, Participant #9, stated:

The reality is, getting a kid on a track for acceleration in middle and high school starts with us. If they’re not ready to be accelerated and take at least Math 7 Honors, at least by the time they get to the middle school, or even potentially Algebra, it’s really hard for them down the road to look at some of those advanced offerings in math and science. And I think sometimes—The District’s Gifted Coordinator completely gets it – but I think others in the leadership realm maybe don’t see that connection. They look at that participation and they aren’t looking at the way we impact, and then the middle school and then the high school—kind of those transitions between.
She pointed out the potential impact of allowing the students to take less challenging courses:

If we limit them in elementary, we’re limiting them for the rest of their school career, and I think, again, with our parents, our parents have a high level of trust in the school, but there’s a huge weight of responsibility with that. They’re trusting us to make good decisions. We want to empower. We want to inform them. We want all of that. Some of our parents are, frankly, working so hard to make ends meet—It is important to them. Many of them have made tremendous sacrifices so that their kids can get a better education than they had, but it’s just a huge challenge to see that kind of long view, of “No. No. He needs to take this honor track in middle school so that he can then be on track to do all these other things.” And all the doors that that’ll open. We don’t want kids closing doors on themselves at 12 and not understanding the ramifications—that it limits the choices they have down the road.

Another principal, Participant #9, noted the importance of parental involvement in identification for services as a key piece of transition support:

We certainly used test scores as one piece, but we looked at and would meet with the teachers to talk about, “Okay, with a little bit of additional support, you know, this kid can do this, and we’re going to push him; and we’re going to talk to the parents and explain why this was important for them down the road.”

The Secondary Educational Specialist, Participant #8, identified data as a key component of efforts to support students during critical transitions:

So the activity, not only with the students, but with teachers from a leadership
perspective is to engage in a conversation around articulation. Do you know your students? Oftentimes we say my name and my need, but for our Academic Potential Project students we say where is the talent? Where are the growth edges? And our conversations are really around knowing that when we have a student engage, and take, and successfully pass an AP or an IB course, we know that there are 300% more likely to go to college. That’s good data. That, for us, is a driver to help engage in a conversation on both ends, with the students as well as with the teachers and school counselors.

**Challenges and Hopes**

Policy design literature describes policy as a purposeful attempt to achieve goals by altering what people do (Schneider, & Ingram, 1993). Those set apart by specific empirically verifiable eligibility criteria to be targeted for influence by either enabling or coercion are the target populations. Whether a group may carry out any social construction depends upon whether these groups have what is considered to be a value-based cultural image (see Figure 2).

![Figure 2: Types of Target Populations](image.png)

*Figure 2. Types of Target Populations, as described by Schneider and Ingram (1993) are thought to augment the discussion of why some groups are more advantaged than others and how policy designs augment or diminish those advantages. Adapted from “Social construction of target populations: Implications for politics and policy” by Schneider and Ingram. 1993, *The American Political Science Review, 87*(2), p. 336. Copyright 1993 by The American Political Science Association.*
These boundaries are assumed to be discrete, however, how a target populations’ boundaries are evaluated may vary depending upon who the evaluator is. As Schneider and Ingram (1993) pointed out:

Social constructions are often conflicting and subject to contention. Policy directed at persons whose income falls below the official poverty level identifies a specific set of persons. The social constructions could portray them as disadvantaged people whose poverty is not their fault or as lazy persons who are benefitting from other peoples’ hard work. (p. 335)

While the target population for the Academic Potential Project was clearly socially constructed to be deserving by the Suburban District’s Gifted Education Program staff, participating principals and community collaborators, other groups, such as some more affluent White parents, socially constructed Academic Potential Project students as undeserving and creating barriers to their own children’s achievement.

Gifted education is considered by some to be a tool that maintains classism and racism within public school settings (Barlow & Dunbar, 2010; Stark, 2014). Several participants perceived efforts by the Suburban District to address that very issue through the Academic Potential Project has made its gifted education program a target for pushback by some of the district’s parents and teachers. They used the term “mindset” frequently in their descriptions of this challenge. One Gifted Resource Teacher, Participant #5, stated:

Oh my, well, if I were to begin I would say the first word I’d have to put out there is “mindset.” Longstanding tradition in our county, at least in our philosophies
prior to having the Academic Potential Project program, was in gifted services, you took an abilities test, and as a result of making the cut-off score or not, determined your eligibility for gifted programs. However, we know that with a lot of standardized tests, a lot of the kids from underrepresented populations, might not identify with a lot of the questioning, so we decided as a county that we needed to do better than that. We could grow and learn and understand that we need to meet the needs of all of our learners. So when you think about this, this is really born in the 21st century right?

An Elementary Gifted Educational Specialist, Participant #10, pointed out the need to face the challenge of changing mindsets. She stated:

I think the main thing is we’re changing mindsets—how to look at children; how to capture potential. The more we provide meetings, workshops, professional development where we talk about these things, the more people are aware, and then they are spurred to action…Yeah that’s the main thing.

Another Gifted Resource teacher, Participant #4, described her experience working with teachers in her school:

Well I do believe that we are shifting a paradigm. We are changing the perspective of all participants in education. We’re showing that students from minority backgrounds have as much ability, as much intelligence as any other students. And even though they may come in a little behind the 8-ball because they haven’t had those nurturing experiences early on as some other students have, we are showing them that when we apply these interventions that change occurs and these students can exceed anyone’s expectations. So first, we have to
convince people that this is possible. And that, not only is it possible, but it’s happening. So we have to get everyone on board. A lot of times, teachers have their own notions about what it means to be gifted.

Participants described the challenge presented by the attitudes of White parents from high-socioeconomic backgrounds. One of the principals, Participant #12, in the study stated:

Well, I think that parents—The parents who have children in the Gifted programs are very adamant about those programs being strong, continuing to develop, and some parents are very—advocate about them becoming even more exclusive than they are, because they want their children to be in more homogeneous groups because they believe that that’s what’s best for their children. They tend to be pretty vocal within school boards or within the communities, so any time there’s any movement to modify or cut anything in aGifted Program, there’s a lot of pushback from those parents, from those groups.

Gifted Resource teachers shared their challenges with some affluent White parents. Participant #2 recounted:

So let’s say folks that might have had the mindset that “What are you kidding me? These kids aren’t gifted.” You know, it’s showing them that maybe in your perspective what you have thought of in your perception, but what about now? …I notice that every year our district’s Gifted Education Coordinator shows us the data and the increase being accepted into colleges. They’re doing honors work. They’re successful. So, it’s been a process since 2001. Think about it, it’s 2016, going on 2017, so almost 20 years later in this process. This is how long it’s
been taking the mindset to evolve, if you know what I’m saying—Because there was a deep, ingrained culture, especially in Virginia, where schools were segregated, and, you know, it’s a fact, and so, a lot of times, those gifted programs were reserved for the Caucasian, elite population, and unfortunately, a lot of parents that are in the community that have held on to that philosophy have a hard time with Academic Potential Project students coming into gifted programs now. And that is the truth.

The respondent continued:

When I taught in the full-time gifted program, I would hear a lot of parents say, “Oh, now that they’re opening up the doors…” the curriculum is being watered down. That is such a myth. That’s a myth! Yes, there’s differentiation in any classroom going on, but given the opportunity, what these kids can do. So I think the biggest challenge is communicating this out more to the parents in our community. Yes. Because I think the teachers get it, but it’s the community of those in the center full-time programs that feel, might feel that, “Uh-oh. Look out. We had the market on this, but now these kids are coming in. They can’t go anywhere else because that’s as high as they can go.” And it’s true. So that’s a real observation. That’s a real issue.

Participant #2 concluded:

We have parents from more elite families who used to go and get their kids coached to take ability tests. It’s a serious thing. That’s why we had to have our customized form of the CoGAT abilities test because they were getting their kids coached. Yes. Yes. Yes, and then sometimes those kids they’re feeling so much
pressure because they were coached. They might not have been exhibiting gifted behaviors – Yes, they were very bright—but I can’t say that. Then some of them get knocked down in the full-time program, so it’s just quite sad that people aren’t understanding that it’s a service not about getting a child on the right track.

Participant #5 described another challenge schools face in striving to do what is best to serve both Academic Potential Project students and high ability students from more affluent families at their sites:

I also think that helping other parents of maybe not quite as diverse want to feel committed to staying in a school. They have a choice. They can either stay at their local school and have the same services, or they can go to a center and sometimes the appeal of the center --We lose some of our families even though we’re offering the exact same thing. That makes it challenging to keep our students.

Participant #11, an assistant principal, shared her story:

One thing that really changed it was having conversations with people, and explaining what the program is about, then, education with teachers for identification for screening purposes, and conversations with parents. Sometimes these conversations were really challenging because people looked at the program as not being open to all people—What were the words that I heard? Trying to remember off the top of my head—Oh. Affirmative Action. That’s what they were calling it. I’d then say, “Well, no. It’s not Affirmative Action.” Then I went to draw the parallel with parents at the time. I was really trying to struggle how could I explain that. I explained it to be along the lines of Head Start. You know we have Head Start for a particular reason – it fits the specific needs of children
and that’s what the Academic Potential Project program is about. It doesn’t mean we’re excluding anyone, it’s just we’re just providing some extra tools because of exclusion in the past…Yes. They called me a racist at one point. They called me racist toward White people. [Laughs] I’m Caucasian!

Another principal, Participant #14, suggested a way to address these challenges:

And so first and foremost it was really about a mindset, and helping teachers and families see that while these students come from, maybe, some troubled homes, maybe they’re exhibiting some behaviors that are inappropriate at times, they really are brilliant and bright and you’ve got to give them the right situation, the right environment, the right activities to pull what’s really inside of them out. The Academic Potential Project falls under that larger umbrella of Gifted Education. So…what we want to see or what we want to try to convey to the public is that the Academic Potential Project is not dumbing it down or taking less. It is an opportunity to nurture a student who doesn’t have all the other pieces to help them move forward.

Summary

Important to the concept of social construction is the notion that people act according to the meanings used to interpret a situation (Nedlund, 2012; Schneider & Ingram, 1993; Segal et al., 1992). Schneider and Ingram’s (1993) theory includes social construction within their approach to understanding the policy process (J. J. Pierce et al., 2014). Schneider and Ingram described policy tools as those aspects of policy intended to motivate target populations. Noting that although appearances sometimes may be to the contrary, policy rationales are the explanations that attempt to persuade target populations
to believe the policy serves common interests. Schneider and Ingram argued that the social construction of the political power of the target population determines how policy tools, policy rationales as well as other elements of policy design will differ (J. J. Pierce et al., 2014).

In the case of the Suburban District, when the target population was parents of Academic Potential Project students versus parents who perceived the project as “Affirmative Action,” or lowering of the quality of Level IV services, the policy tools needed to motivate them to provide continued support of the Gifted Education Program Office were, of necessity, in some cases, different. Minutes from work sessions and school board meetings from 2003-2013 indicated continuous challenges and demands for accountability from parent groups, the Gifted and Talented Advisory Committee, and evaluators to ensure the goals of the Academic Potential Project did not diminish services in Level IV Centers. The continued demonstrated effectiveness of the Level IV center and school-based programs may have provided sufficient policy tools for some.

For others, however, the Gifted Education Program leadership’s social construction of a need to reform gifted education in the district provided values-based motivation for the creation of and continued support of the Academic Potential Project. Indeed, due to the Gifted Education Program leadership’s effectiveness in the social construction of a need to reform gifted education in the district, ownership of the Academic Potential Project and professional development priorities were integrated into the district’s overall academic excellence goals. Perhaps, the most effective policy tool for those who did not deem themselves direct beneficiaries of the Academic Potential Project was simply membership in a school district deemed to be exemplary, and
recognized nationally, including special recognitions received due to the Academic Potential Project.

In general, participants were consistent in interpreting the work they do as important, and exhibiting pride in their role in the Academic Potential Project, a model they perceived to be exemplary. A theme expressed among participants was a sense of pride in how their district compares to other districts. One Gifted Resource Teacher, Participant #5, stated:

For me, and I'm sure I'm biased, but when I go to state conferences, and I research other gifted programs, which I have been, I just feel like, we're not perfect, but in terms of what we're trying to accomplish and where we are, we're pretty far ahead of many other counties and school districts. I think we definitely go above and beyond. We're also the third [sic] largest district, or something, in the country, so I know we have some more resources and so forth. It is helpful to have that policy. It is helpful to have the support of the central Gifted Education office. They're constantly advocating. Then spreading that out amongst the other resource and General Ed. teachers. I think that right now, the time is right to really help.

She continued:

Every time I go to a meeting, the word's "rigor." “Rigor,” “challenge,” — everybody wants all of these great strategies. Everybody wants the curriculum, and they realize all of their students need this, not just those in the top levels, but, really, everyone. I feel like that's going to have the biggest change in helping more students realize their potential as well. Even if they're not in the full-time
program, they should still be getting some of the same awesome curriculum and strategies.

Policy historiography exemplifies this application of social construction theory to policy development in that it examines the foundation of change due to prevailing attitudes and principles that influence subsequent policy developments in history and current practice (Gale, 2001). One Gifted Resource Teacher expressed the prevailing attitudes and principles that would likely influence subsequent policy developments in the practice of gifted education in the district for this study’s participants:

Well, I just say, continue going boldly where no one has gone before because they—as long as—we—I can’t even give you enough of the accolades that our district’s Gifted Education Coordinator deserves, that everyone working with this program deserves, because they don’t just sit on this. They share it. They give it away. They share it. They send it out. We’re constantly being urged to share out at our Virginia Association for the Gifted, the National Conference for the Gifted. We are constantly being encouraged to share with our peers and our colleagues across the county. I have shared many times, in many areas given workshops as far as my own professional life with the Academic Potential Project, so I think what we’re doing is the right thing. Feeling free, feeling bold enough to get out there and share it with the rest of the world, bringing those examples of children who can do amazing things and sharing that with the world. So as long as we are doing that part, and continuing to build within our own structure, and other schools taking it on, and other kids getting exposed to this, I think that’s the right track. I also think that our curriculum framework is really good…There’re just so
many great things that are going on. All I can say is, it needs to continue, and needs to be spread throughout the country.

Data Matrix – Findings

A data matrix is described as a diagrammatic representation of ideas (Corbin & Strauss, 1988). The data matrix provided a summary of information across data sources. Using the adapted Results Chart developed for this study (Gallagher, 2015), and the data matrix created as part of the document review, documents were compared to interview transcript data. This allowed opportunities to ascertain areas of convergence or divergence in the participants’ perceptions of their experiences in working with the Suburban District’s Academic Potential Project (see Appendix L). These representations built a systematic, logical and integrated account of the relationships between the significant policies and events that have affected the Suburban District’s Gifted Education Program, the perceptions of the stakeholders, and the impact those perceptions had on the development of the program. The stronger areas of connectivity that were represented in the data matrix are:

• The increased participation in the Suburban District’s gifted education program by African American, Latino and/or low-income students.

• The changes in enrollment due to local identification policy changes.

• The prioritizing of school-level leadership development.

• The development and expansion of professional development opportunities for teachers.

• The integration of Academic Potential Project pedagogy and curriculum into the professional development of all teachers in the Suburban District.
Data converged both sequentially and perceptually. One path of connectivity, for example, was between the outcome of the discussions of the informal task force that convened in 2001 and the United States Department of Education Office of Civil Rights (OCR) complaint. The sequential order of events was:

- The Suburban District received an OCR complaint.
- The task force convened charged with studying the problem of underrepresentation in gifted education in Title I schools.
- The task force made recommendations that led to the creation of the Academic Potential Project.
- The Academic Potential Project was an effective means to demonstrate efforts on the part of the district to address concerns raised by the OCR.

This development of the model set in motion a series of events:

- Change from pull-out model to collaborative teaching.
- Professional development requirements for Gifted Resource Teachers on Academic Potential Project.
- Targeted principal leadership development efforts.
- Revised curriculum framework and academically rigorous curriculum and to be used with Academic Potential Project students to allow opportunities to show higher level thinking.

The second sequential path happened in 2007 when the Gifted Education Program response to the Gifted and Talented Advisory Committee Report and district documents indicated the Suburban District had met the requirements of the state’s local plan. These converged that year with:
• Gifted program name change.

• The gifted endorsement mandate for full-time teachers of gifted students.

Participants also demonstrated a perceptual path of connectivity. Responses suggested shared convictions about their responsibility to respond ethically to the increasingly diverse district by making efforts to “level the playing field.” The majority of participants had worked in the Suburban District with the Gifted Education Program Coordinator and had had some role in the Academic Potential Project for many years. Two had been a part of the model since its first year. Five had joined within the first three years. Even all but one of the most recent stakeholders had been with the Academic Potential Project in some capacity for 7 or more years.

The district leadership’s adoption of certain of the model’s core courses as required professional development for all of its teachers suggests a systemic change has occurred due to the positive impact of the Academic Potential Project on gifted education program participation and college access for students from populations typically underrepresented in gifted education programs nationwide. This study provided the opportunity to examine factors considered when there is continuity in administration over an extended period of time, and to consider the potential impact on the model if the charismatic leader is no longer with the program. Due to the intentionality of the Gifted Education Coordinator in the use of data, the prioritizing of school-level leadership development, and the professional development of Gifted Resource Teachers, the social construction of the model suggest a potential for stability through potential leadership transitions and lays the foundation for scaling both in policy and practice. These factors will be developed in Chapter 5.
CHAPTER 5
DISCUSSION

Policy historiographies of education might vary, but share the common goal that Kincheloe (1991) ascribed to most histories of education that include examining “the processes of educational change and to expose the possible relationships between the socio-educational present and the socio-educational past” (p. 234). The purpose of this historical case study, with incorporated elements from policy historiography, was to examine policy and practice in one school district making efforts to alleviate underrepresentation of African American, Native American, Latino and/or low-income students in its gifted education program. These methodologies were used to examine the social construction of the reality of reform in the policy and practice of the gifted education program in the Suburban District. A chronology, presented as a decade by decade summary of events, was derived from a document analysis of primary and secondary sources, as well as an examination of federal and state policies considered to be important to the recent history of and practice of gifted education. Where relevant, oral accounts were included to support the data gathered through document review. For example, in the Results Chart (Appendix K) connections are identified by theme, relevant
literature, policy issue, level of policy, data source, data collection method, and quotes.

Semi-structured interviews were conducted in order to investigate stakeholder’s perceptions of the federal, state and local policies most influential on changes in policy and practice to the district’s original gifted education mandate. The results were reported in two parts and explained by identifying factors and sub-factors perceived by participants to influence the practice of gifted education in the Suburban District. These factors were leadership, impact of policies and challenges and hopes.

In consideration of the first research question, examining the potential impact of federal, state and local policies on the underrepresentation of African American, Native American, Latino and/or low income students in gifted education programs within the school district, stakeholders perceived that although federal and state policies had some impact on educational practice, which at times could be quite significant, local policies lead to the most beneficial changes for underrepresented students in the practice of gifted education in the Suburban District. This was perceived especially true as it related to identification for gifted services and instructional practices. Key to these changes was intentionality on the part of Gifted Education Program leadership in not only changing identification policies, but also addressing underlying teacher beliefs and attitudes that informed their decisions whether to refer a student for gifted services through professional development policies and teacher peer coaching. The policies, therefore, yielded the desired effect on changing practice and increasing the percentage of African American, Latino and/or students from low-income communities in the district’s gifted education program.
While district documents indicated that identification for gifted services in the Suburban District previously had been simply a quantitative notion based on a single score, the shift to multiple criteria and the creation of the Academic Potential Project presented a qualitative change. The case study approach to identification represented a holistic consideration of the child’s potential and past experiences. The Suburban District has become a model of gifted education program reform in the United States. Academics and journalists have written articles on its Academic Potential Project indicating that through an online education company, the professional development course developed on the model is taught to educators from school districts around the country. The Academic Potential Project is featured at state and national gifted education conferences as an effective model for identifying and serving underrepresented students. Delegations of administrators and researchers have visited the school district to observe the students in their classrooms or summer programs and teachers in the use of academically rigorous curriculum with this population.

While what happens in the nation’s public schools is often an issue of great public and political interest, the focus of that interest varies based on numerous factors including historic periods, urban, suburban or rural community considerations, and a district’s demographics. Gifted education has been ignored or prioritized for a variety of reasons over time (Colangelo et al., 2004; R. Miller, 1997). In the Suburban District, a large, mostly White, affluent district, reform of its gifted education program to address the issue of underrepresentation of African American and Latino students and/or students from low-income circumstances has been well-supported and demonstrably effective (Olszewski-Kubilius & Clarenbach, 2012).
Among the factors that led to the changing culture and subsequent changing policies of the gifted education program in the Suburban District were a philosophical commitment by district leadership to both equity and excellence, school-level leadership development efforts, and teacher capacity-building through professional development and peer coaching. Participants described a belief that the moral authority of the district’s gifted education coordinator was central to the social construction of a need to reform gifted education in the district in that the principals and teachers found her to be credible. The focus on professional development and leadership development established a cohort of administrators and instructional leaders who defined the Academic Potential Project students as a target population connoted to be worthy of benefits. By bringing in experts in the field of gifted education to build teacher capacity in gifted pedagogy as well as cultural competency, these leaders were equipped and positioned at the school level to serve as advocates for the development of a social world at their sites that valued opportunity and access to academic rigor for students from all socio-economic backgrounds. This prioritizing of school-level leadership ensured support of students who customarily lacked access, and provided tools for parents to reinforce their children’s education.

The adherence to Borland’s (2004) conceptualization of identification as a “process, not an event” (p. 20) is evident in the Suburban District. Their data support this case study model. Students identified for services using this less mechanical model, with open-ended teacher referrals developed to replace checklists, and with a focus on the student’s curriculum-based performance, have received the gifted services necessary to support their strengths beginning in kindergarten. As a result, they were prepared for
honors, AP and IB coursework in high school. The percentage of African American and Latino students receiving gifted services has increased significantly between 2000 and 2014. In 2000 of 3,398 students receiving gifted services at the full-time Gifted Centers, 66 were Latino and 76 were African American. By 2014, of 19,157 total students receiving gifted services 1419 were Latino and 928 were African American. Of the 8,924 receiving school-based services in 2000, 311 were Latino and 475 were African American. In 2014, tremendous growth was evident with 4079 Latino and 2064 African American students among 22,621 students participating in the school-based program.

This growth was also represented in the increase in number of advanced diplomas. In comparing Virginia Department of Education Credentials Earned Annually reports, of the 1089 African American diploma graduates in 2003-2004 academic year, 363 received advanced diplomas. In 2015-2016, however, of the 1507 African American graduates, 702 received advanced diplomas. Latino student populations have grown significantly in the Suburban District during the same period as it has nationwide. In the 2003-2004 academic year of the 996 diploma graduates, 357 received advanced diplomas. In 2015-2016, 2435 Latino students were diploma graduates in the districts. Of that number, 1086 received advanced diplomas. That change is attributed to the Academic Potential Project in the Suburban District. Most of the first cohort of Academic Potential Project students has successfully matriculated at colleges and universities. (Virginia Department of Education, 2016).

Not only did stakeholders perceive the policies that led to the development and implementation of the Academic Potential Project to impact the identification process for gifted services and address teacher beliefs and attitudes, but also, the Suburban District’s
leadership found the Academic Potential Project to be useful when facing OCR complaints and supporting the district’s goals related to closing the achievement gap. Regular meetings on the issue with principals, teachers and district office staff earnest about closing the opportunity gap, encouraged open dialogue about the sensitive historical issues of race and class never far from the surface. Both document review and semi-structured interview results indicated that the district’s Gifted Education Coordinator initiated the steps necessary to begin the process of systemic change.

**Leadership**

The second research question guiding the study was, “What relationships or historical events, if any, did stakeholders perceive to be most influential on changes in policy and practice to the original gifted education mandate in Suburban District?” Participants’ responses suggested that although there were historical events that impacted access to gifted education in the Suburban district over time such as the history of segregation and the desire by some families to experience gifted education as a way to maintain that homogeneous educational experience for their children, it was relationships that were most influential in changes in policy and practice. This included the relationships established between Academic Potential Project principals and their peers as they shared the benefits of the model in their buildings, and Gifted Resource teachers and their colleagues as the program shifted from a pull-out to collaborative teaching model. Participants perceived the relationship, however, between the Gifted Education Program Coordinator with administrators, teachers, specialists and the community at large to be most influential on the change in policy and practice in the gifted education program.
The connections formed between followers and leaders are the focus of relationship or transformational theories. Increased motivation and morality in both the leaders and the followers is the result of the way an individual creates connection and engagement with others according to these theories. Charismatic leadership theories are often compared to relationship theories in that they regularly share qualities that are seen to motivate others such as clearly stated values, extroversion and confidence. Because of their ability to help group members see the moral imperative of the task, relationship or transformational leaders are able to motivate and inspire those with whom they work. This occurs because of their focus not only on the performance of the group, but also on supporting each member of the group in fulfilling his or her potential (Amanchukwu, Stanley, & Ololube, 2015).

Thus, it is difficult to discuss perceptions of leadership development in the Suburban District’s gifted education program without discussing the participants’ perceptions of the leadership style of the district’s Gifted Education Coordinator. She had assumed the role of coordinator with the intention of being a change agent (Suburban District Gifted Education Coordinator, personal communication, November 21, 2016). Gifted resource teachers, educational specialists and principals recognized her as exactly that. Because she approached changes in the program with research-based curriculum and instructional best practices, and continues to use data to document areas of effectiveness as well as opportunities for growth, the model has enjoyed sustained support from the district’s leadership. As a model for identifying and nurturing talent in students typically underrepresented in gifted education programs, it has also begun to impact gifted education in other communities throughout the state and the nation.
Professional Development

Ensuring that gifted resource teachers are equipped to provide instructional leadership in the switch from the pull-out to the collaborative teaching model is an ongoing goal of the Gifted Education Program Office. Also, professional development to ensure cultural competency through an Academic Potential Project course is intended to raise awareness of what must be done to most effectively serve an increasingly diverse student population very often from different cultural backgrounds than their teachers. Through an initial collaboration with a professional development company founded at a research university, an Academic Potential project online course was developed. This course has allowed both Suburban District staff and people from throughout the world to take advantage of what those in the Suburban District learned through the implementation of the Academic Potential Project. The cultural competency course developed through these efforts has been important in the Gifted Resource Teacher’s role as peer coach in that it has changed the beliefs and attitudes of some general education teachers, and has increased the odds that they will identify African American, Latino and/or students from low-income circumstances for gifted education services.

Principal Leadership

Principal leadership informs the experience of gifted students (Louis et al., 2010). How teachers work with students or with each other is often informed by the instructional leadership role the principal plays (Lewis et al., 2007). A principal’s support of professional development may also inform how teachers understand gifted behaviors. This, in turn, may influence identification and, ultimately, impact underrepresentation in
gifted education programs (Frank, 2007; Harradine et al., 2014; C. Tomlinson & Jarvis, 2014).

District-level support of individual building efforts has proven to be one critical aspect of the model’s effectiveness. Because prioritizing support of school-level leadership is a core principle of the model, there is flexibility in implementation. Principals can decide, based on the circumstances of their schools how they will deliver services at their sites in keeping with the model’s frames. In addition, scaling up of the model in the district has been a grassroots, peer-led movement facilitated by the principals’ meetings sponsored by the Gifted Education Program office. This has led to principals not only being willing to allow the Academic Potential Project at their schools, but anxious to have it there as a strategy for building community, and supporting student achievement.

Context

As a local school district in a state receiving federal funding, it is important to note that local policies were not implemented without consideration of state and federal accountability requirements. While federal and state policies did not overwhelm the district’s goal to reform its gifted education program, they did have to be addressed. State policies, however, were perceived to be more supportive of the district’s efforts. The state requirement that school districts serve gifted students, that school districts include in their plan for serving students specific guidelines for how they intend to serve underrepresented students and that multiple criteria be use for identification for program participation were consistent with the goals of the Suburban District’s Gifted Education Office. With NCLB and the shift to minimal proficiencies, federal policies were
sometimes a distraction from the Suburban District’s goals to support advanced learners. Even while feeling the weight of the federal compliance requirements, participants pursued the implementation of the local policies intended to address underrepresentation with a level of enthusiasm born by a sense of purpose. They believed that the professional development provided by the District was useful and equipped them to meet the diverse learning needs of their students.

While federal policies were in place to support special education and ELL students, gifted education did not begin to approach the level of support given to those special populations of learners. The district was not without attention from the Department of Education, however, and on more than one occasion, met the compliance agreements of OCR complaints by documenting their efforts to close the academic achievement gap between African American and Latino students and their White counterparts, through the Academic Potential Project.

**Implications**

**Implications of Scale**

It is difficult to examine the impact of policy on practice in the gifted education program in the Suburban District without consideration of scale both as indicative of boundaries of local, state and federal jurisdiction as well as through the lens of practice in the continued development of the Academic Potential Project in the district. As scale relates to policy, it cannot be denied that throughout the history of the district from *Plessy v. Ferguson* to ESSA, federal education policies, jurisprudence and legislation have informed the educational practice in the Suburban District. Throughout the years, these policies, often linked to funding, have determined the district’s compliance with
mandates including desegregation and NCLB’s accountability measures such as high-stakes testing (Lamiell, 2012; Ravitch, 1983, 2004).

Participants noted the impact of federal policies on practice in serving high ability students from underrepresented populations in that many Academic Potential Project students attended Title I schools. With the focus on test preparation, in many American schools, there was a narrowing of curricular options for students (Kozol, 2006). Yet, for better or worse, the experience of the most vulnerable populations of students is most deeply impacted by federal legislation, whether those are benefits or punishments. Thus, the education policy goals of the newly elected President and his current administration are concerning.

While President Obama’s goal was that by the year 2020 the United States will lead the world in college graduates (Obama White House Archives, 2011), with the recent national election, there has been a shift in federal education policy goals. The new President has appointed a billionaire Secretary of Education whose agenda, if successfully implemented, would defund public schools and encourage a voucher system that would allow public funds to be diverted to charter schools and private schools, including religious schools (Coryton, 2016).

According to the United States Department of Education’s National Center for Education Statistics (2016b), in fall 2015, an estimated 5.3 million students were enrolled in private schools at the elementary and secondary levels (U.S. Department of Education, 2016a). In school year 2013–14, over 50.0 million students were enrolled in public elementary and secondary schools. The recent budget proposal submitted by the new President, however, projected cuts of funding to the Department of Education by $9

The Secretary of Education’s myopic focus on implementing her agenda has led to significant gaffs. After meeting with presidents of Historically Black Colleges and Universities, for example, she released a statement describing them as “pioneers” of “school choice” (Douglas-Gabriel & Jan, 2017; Jaschik, 2017). Given the history of the universities which were created as a response to racism when most American universities denied admission to African American, Latino, Native American and other non-White people (Freemark, 2015; Gasman & Hilton, 2012), this lack of awareness was further proof to many of how out-of-touch with the realities of those she purports to serve in her role (Levitz, 2017; Whack, 2017).

Effective leadership at every level is vital to education reform that will support the most vulnerable populations of learners. When considering both the potential impact of federal policy on the experiences of these populations of students in schools, and the potential of federal mandates to distract teachers from the higher imperative of educating students with the rigor necessary to develop their potential, there may be a valid cause for concern.

African American and White student populations are decreasing in public elementary and secondary schools in the United States, but Latino student populations continue to grow. African American student populations, for example, decreased from 8.3 to 7.8 million between 2003 and 2013 representing 1% fewer students. During that
same period, White student populations in public schools decreased from 28.4 million to 25.2 million representing a decrease from 59 to 50%. Latino students, however, increased from 9 to 12.5 million representing 6% growth in population (U.S. Department of Education, 2016a; U.S. Department of Education, 2016c). How districts respond to the changing demographics in public schools can determine whether schools produce the next generation of innovators and problem-solvers or graduate students ill-equipped for the future, and educated for a by-gone era.

While the Suburban District chose to respond to the increasing diversity in the district by providing opportunities for exposure to increased rigor for students in schools that had sometimes responded to the increased accountability pressures with low-level instructional practices, what the new Secretary of Education is proposing, with the focus on vouchers and charter schools, many have described as a shift that suggests a return to Jim Crow practices (Coryton, 2016). More than sixty years after Brown v. Board of Education and more than 50 since the passing of the Civil Rights Act of 1964 and the Elementary and Secondary School Act of 1965, policies that were enacted to end segregation, and prevent public funds from supporting the practice are threatened.

In 2016, 19 states, most located in the Southern states that resisted desegregation longest, supported children’s attendance in private schools with public funding either directly with vouchers or indirectly with tax credits. Some states offered both options. Because private schools can still maintain policies regarding who they choose to admit, and can forego the sort of oversight, transparency and accountability required for public schools, these policies provide spaces that can essentially remain White. As indicated in
the report by the Southern Education Foundation (2016), by diverting over $1 billion to private schools in Southern states, segregation in these states has worsened.

States previously recognized for their support of public education are now known for their destructive efforts. North Carolina, for example, after the 2010 take-over of the legislature by Tea Party Republicans, cut funding for public education on every level in favor of for-profit charter schools, for-profit virtual schools. Teacher salaries and student spending are among the lowest in the United States. Its North Carolina Teaching Fellows, five-year career teacher preparation program, was defunded. Nearly the same amount of funding taken from that program was designated to bring in Teach for America recruits who undergo, merely, five weeks of training and offer little continuity for students in that their service commitment is brief. (Fitzsimon, 2015; Honig, 2016a; Strauss, 2015)

Indiana, another state previously known for supporting public education has also drastically cut funding for the 94% of the state’s students served by public schools by over $3 billion between 2009 and 2013. During the same period the nearly 7% of students served by charter schools, vouchers and virtual schools gained more than $900 million (Honig, 2016a). Although argued as a way to provide choice for low-income families who desired to escape low-performing schools, Mike Pence expanded voucher programs in Indiana during his tenure as Indiana’s governor to support middle-income parents at 50%. With this shift, the number of private school students has not grown at the rate of voucher usage, suggesting that many of those using vouchers were never enrolled in public schools. Further, given the tuition of many of the private schools accepting vouchers, even with a 90% voucher available to students from low-income families, the tuition remains out of reach.
Much of the recent research is finding little measurable benefit (Honig, 2016a; McInery, 2016). In a recent study of the Indianapolis school district, Notre Dame University researchers found that students who switched to private Catholic schools did worse in math and showed no change in reading (Cavazos, 2016). Students from the most vulnerable populations often left behind in these school choice models. Since funds in Indiana follow the student, for example, this has further stressed the resources of public schools in districts with high numbers of students transferring to private schools. It is understandable why many argue that those funds can be better spent to improve public schools for all students and suggest that policies developed should support systemic, supportive changes to public schools (Honig, 2016a).

This study provides several lessons as to how districts may approach systemic policy changes to address underrepresentation in gifted education programs. Program documents and articulated perceptions of stakeholders in the Suburban District suggest that primary policies supporting the Gifted Education Program’s practice as it related to the Academic Potential Project were implemented on the local level. While the circumstances of the Suburban District’s size and resources may present unique opportunities not shared by smaller school districts, much can still be learned from their effectiveness in providing access and academically rigorous educational opportunities to students from the most vulnerable populations.

**District-level commitment of leadership to addressing the issue.** As demonstrated in the Suburban District, a district-level commitment to addressing the issue is foundational to meaningful changes in policy and practice. Another key leadership strategy that benefitted the growth of the model was support of school-level leaders
through training events. This provided connection between schools and the opportunity for communicating a shared vision of what service to high-ability learners means in the district. Most participants stated the articulation of a moral imperative to lead this charge in the district. The commitment to leadership and leadership development also provided an opportunity for scaling of the model in the district through peer-to-peer communications.

**Scale and policy.** Papanastasiou (2014) noted scale is often perceived as a “vertical ordering of the social world where this hierarchy or scaffolding is given labels such as the ‘local’, ‘national’ and ‘global’ central to the understanding of policy by social scientist and policy actors” (p. 6). Marston (2000) argued that to understand the social construction of scale, one must lend attention to the relationships between capitalist production, social reproduction and consumption. These ideas seem to merge in Meier’s (2004) ideas on scale and education reform. She suggested that today’s exceptions could be tomorrow’s norms if there is an intentional approach to scaling up effective models. Her assertion of the need for “the strange bedfellows” (p. 298) of conservatives, business leaders and accountability activists as the potential partners to allow for scaling of educational programs that have proven effective with unfettered access to vouchers, would frame the current Presidential administration a welcome opportunity for education reform. Honig (2016b), however, cautioned:

Unfortunately, while there is a growing shift away from the conventional “reform” agenda, these increasingly discredited proposals continue to be supported by far too many political and opinion leaders, wealthy individuals,
editorial boards, think tanks, and well-funded organizations. This must change.

(para. 10)

**Scale and replication.** The concept of scale impacted the work of the Suburban District’s gifted education program both from the top down through federal and state policies and funding, and from the ground up through grassroots scaling up of the model in the district through principal leadership and districtwide resource and training support. This is the sort of scale that was encouraged by Olszewski-Kubilius and Clarenbach (2012) when examining programs that have been effective in serving underrepresented gifted students. They stressed the importance of, “creative approaches to combining and customizing models to meet the needs of specific populations of gifted students within particular geographic contexts will be key to the success of any program or intervention” (p. 15).

**Use of data to identify areas of success and opportunities for growth.**

Suburban District staff spoke of the “growth edges” data provides. They valued statistical data, but also what could be learned by qualitative data such as video and face-to-face interviews with students and parents. Research was also important in curriculum selection and identification of best-practices in gifted education pedagogy. This data informed next steps and the development of the model as it expanded to other sites. It was also integral to the development of districtwide policies for serving Academic Potential Project students throughout their school careers including the policy to allow students to self-select for rigor and the tagging of Academic Potential Project students in the district’s database.
**Professional development.** Full-time Level IV Center-based, Honors, AP, IB and gifted resource teachers are required to obtain the gifted education endorsement within five years. Parents were reported to approve of the gifted education endorsement requirement because they thought it ensured that the highest expectations were in place for those charged with the instruction of gifted students. The potential for teachers to grow and then mentor their peers as a result of effective professional development cannot be understated. Professional development was vital to training in the use of new curriculum, but also was a powerful tool for addressing cultural competency issues that can impact whether students are identified for gifted services. Consideration of the potential for staff turnover, given the size of the district, training is regularly scheduled.

**Budget as the policy.** Prioritize resources for the effective implementation of the model to ensure that curriculum, training, and experiential opportunities for students can be supported. While it cannot be denied that federal and state funding impact a school district’s capacity, prioritizing school-level leadership development and community collaboration, provides opportunities for flexibility in resource allocation that the vertical scaling of funds does not allow.

**Implications for Preservice Teacher Training and In-service Professional Development**

African American, Latino and Native American students are underrepresented in gifted education programs. Participants in the present study stressed the importance of professional development to the change in their own mindsets and that of their peers. McBee (2006) noted that equipping classroom teachers to understand gifted behaviors is imperative since they provide most nominations for gifted education programs.
participation (McBee, 2006). Deficit thinking in teachers is often linked to the low rates of referral of African American, Latino, Native American, ELL and/or low-income students for participation in gifted education programs (Frank, 2007). Because gifted behaviors may present in a culturally specific way, teachers who are culturally responsive are critical to closing the opportunity gap. Underrepresentation may lie at the intersection of the optional nature of gifted education and multicultural education courses for pre-service teachers. In most university programs, neither course is a part of the core curriculum, but each is only offered as an elective, if at all (Ford, 2011).

The relevance of Frank’s (2007) aforementioned quasi-experimental study is quite evident as it relates to the outcomes in the Suburban district’s gifted education program. As Frank found that Texas teachers who received professional development came to recognize gifted characteristics outside of their own cultural lenses and identified more migrant students for gifted programs, the cultural competency course required for Gifted Resource teachers in the Suburban District also impacted identification of underrepresented students. With the continually increasing diversity in public schools, course requirements should include multicultural education and gifted education pedagogy to equip teachers for differentiation and acceleration in heterogeneous classroom. For in-service teachers, professional development should be on-going and include both cultural competency training as part of the on-boarding process and provide on-going coaching in the use of research-based curriculum and best instructional practices. Because the Suburban District put practices into place such as prioritizing principal leadership, teacher professional development and collaborative teaching,
whether the model is sustained is not necessarily linked to one individual or the variations in annual budgets.

**Implications for Advocacy**

The National Association for Gifted Children provides an advocacy toolkit to assist those who hope to change policy or practice for the benefit of gifted children locally, statewide or nationally. Some of the strategies they suggest for maximizing your input are that there is strength in numbers and suggest getting parents, and teachers to join you in contacting elected officials. They suggest starting a local advocacy group if none exists, and/or collaborating with other groups. They also suggested using the media to help augment your message with letters to the editor or working with reporters (“Advocacy Toolkit,” n.d.). Duke (1989) suggested that local policies have the most impact on the experiences of minorities in school. This was consistent with the document review and interview data examined in this study and suggests that the policy reform that impacted underrepresentation most in the Suburban District was local policymaking, advocacy efforts that focus on local policies, legislation and procedures.

**Implications for Future Research**

McBee et al. (2012), examined the impact of policy on the development of more equitable access for underrepresented students. Swanson (2007) examined gifted program development and implementation from the unique perspectives of policymakers, district level administrators and school level practitioners. Gallagher (2002) and VanTassel-Baska (2006a, 2006b) delimited the study of policy in terms of resource allocation. Using South Carolina as a model, Swanson and Lord (2013) provided a conceptual framework to explore how state policy can be influenced and evolve. Brown et al. (2006) provided a
broader definition describing policy as "The rules, statutes, codes, and regulations adopted by state legislatures, interpreted by state school boards of education and state departments of education, and implemented by local school districts” (p. 11). Federal, state and local policies impact the educational experiences of students and determine whether they will have access to higher-level experiences that will provide opportunities to develop their talent.

African American, Native American, and Latino students are underrepresented among top academic performers in the K-16 educational system (Ford & Whiting, 2008; L. Miller, 2004; Olszewski-Kubilius & Clarenbach, 2012). Students from low-income families are overrepresented in this group (L. Miller, 2004; Plucker et al., 2010). Researchers, whether exploring professional development, curriculum, identification, or other aspects of gifted education as a field have a common finding. Race and socio-economic status have much to do with whether one will be identified for gifted services, and for African American and Latino students is often a guarantee that they will not be (Barlow & Dunbar, 2010; Bernal, 2002; McIntosh, 1995; Wyner et al., 2007; Yoon & Gentry, 2009). Through comments made during semi-structured interviews participants’ perceived the cultural competency course required in the district as valuable in creating awareness to address the aforementioned issues. A follow-up study with disaggregated demographic data on teachers and students on identifications correlating the number of referrals by general education and gifted teachers before and after the cultural competency, course could be informative. More follow-up is needed to determine if pre-service teachers who elect courses in multicultural and gifted Education are more effective in identification of underrepresented students for gifted services in a general
classroom setting than are teachers who do not take such courses. This would have implications for teacher training program policies and in-service professional development design.

Certain issues such as parent and student perceptions of their experience in and the effectiveness of the Academic Potential Project provide opportunities for future exploration. Further, although some Gifted Resource Teachers mentioned collaborations with ELL and Special Education teachers in the implementation of critical and creative thinking lessons, Socratic Seminars or other activities requiring higher-level thinking, there is much to be learned about these cross-disciplinary efforts, and their effectiveness in providing gifted services to Twice-exceptional or ELL students. Also, many decisions regarding the implementation of the Academic Potential Project are made at the school-level and depending upon a school’s location may have more private resources invested into the model. A comparative analysis of Academic Potential Project student experiences across the district based on their school’s location, and level of community, business and other private sector involvement could be meaningful to explore.

Limitations

Limitations are those aspects of a study that are beyond the researcher’s control. First, demographic distribution of participants is one limitation of the present study. Although an invitation to participate in the study was sent to all Academic Potential Project principals, elementary and secondary gifted educational specialists, and gifted resource teachers in the Suburban District, a total of 14 educators agreed to participate in one-on-one, semi-structured interviews. This group consisted of 13 females and 1 male representing five gifted resource teachers, four principals, one assistant principal, two
elementary gifted educational specialists, one secondary gifted educational specialist, and one district gifted education coordinator. Although the Suburban District provides gifted education services to students K-12, other than the gifted education coordinator, 12 of the participants represented elementary education and only one represented secondary education. Also, because the participants self-selected, their enthusiasm for the Academic Potential Project and the Gifted Education Coordinator’s leadership style may not be representative of a larger or random sample.

Another limitation of the study was due to how the interview data was collected. Because participants were interviewed via telephone, visual cues and body language were not possible to ascertain and this researcher was limited to vocal cues in interpreting the participants’ responses to semi-structured interview questions. Time was a factor in this due to the limits of the data collection window permitted to the researcher by the Research Screening Committee of the Suburban District for data collection. With only two weeks to collect data, a portion of that time over the Thanksgiving holiday when many potential participants were unavailable, travel for face-to-face interviews was prohibitive, and between televisual and telephone interviews, telephone interviews were preferred by the participants. Since their agreeing to participate was a courtesy to the researcher, their preferences were respected.

Due to some limitations of access to resources and data in the Suburban District, it was not possible to review every document related to the policy and practice of the gifted education program in the district. Several factors contributed to this constraint. The limitation of time, the denial of access to some documents by the Suburban District’s Research Screening Committee, and a change in the district’s online data management
system that left some archival documents inaccessible not only to me, but also to Suburban District personnel who attempted to assist me in retrieving the documents to which access was allowed.

Findings from this study suggest gifted education policy must be agile, but practical and strategic to be effective in responding to students’ needs. Findings also suggest that key to policy development must be the effective practice of data-mining for program development, and student advocacy. In addition, leadership and professional development is vital to the efficacy of the model and to teacher capacity-building efforts. Findings of the current study join a growing body of research on underrepresentation in gifted education, culturally responsive teaching, and gifted education policy.

**Summary**

The story of the Academic Potential Project, gathered through document review and participant interviews, is one of effective policy reform in a local district’s gifted education program. From the social construction of the need for policy reform to its formulation and implementation, careful data analysis, clear policy goals and policy instruments led to the development of a research-based model with a research-based curriculum framework and instructional pedagogy. Throughout the Academic Potential Project model’s development, attention was given to the way stakeholders made sense of the local gifted education policymaking process.

As demonstrated by the Suburban District’s effectiveness, gifted education has great potential to be a means by which low-income high ability students become a part of the college pipeline. Educational policy that addresses the problems specific to this group of learners obtaining college readiness, is critical at every level of the policy scale,
national, state and local. Fowler (2012) proposed six steps to the policy process of which educational leaders should be aware if they hope to impact educational policy: issue definition, agenda setting, policy formation, policy adoption, implementation and evaluation.

**Issue Definition**

The first stage, issue definition is the process by which a problem is transformed into an issue the government can address (Fowler, 2012). The language used to define the issue of the need to change the identification process for gifted services, both for those comfortable with the status quo in gifted education in the district, and those desiring a change in the process, framed the issue as an ethical need to respond to the experiences of students as indicated by the data, regarding access, initially, for African American and Latino students in the Suburban District’s gifted education program service. They clearly communicated the research-based need to start early. This issue definition transformed the problem into something that could be addressed through policies on multiple criteria for identification, professional development for principals and teachers and access to higher-level creative and critical thinking curriculum for K-2 students.

**Agenda Setting**

Fowler (2012) pointed out that for an issue to become a policy, it is necessary that it become a part of the policy agenda. The principals involved in the Academic Potential Project and the Gifted Education Coordinator worked to get the issues to be addressed in on the policy agenda by making it critical to their own policy agendas as indicated by funding allocation for summer programming and purchase of additional gifted resource teacher time. In so doing, they were able to rally their colleagues and build bridges to
other potential collaborators.

**Policy Formation**

Because a policy must be expressed in written form before it can be formally adopted (Fowler, 2012), the power of the Gifted Education Office’s task force recommendations and piloted efforts, including the creation of the Gifted Behaviors Rating Scale, was evident in that the Suburban District’s leadership adopted the goals of Academic Potential Project’s professional development requirement for all teachers, to respond to OCR complaints, and to include in their formal plan for addressing the achievement gap in the district.

Other policies that became a part of the written guidelines for serving students in the district included the policy to tag all Academic Potential Project students in order to ensure that they are supported throughout their K-12 academic careers, and the policy allowing secondary schools students to self-nominate for rigorous coursework.

**Policy Adoption**

Policy Adoption is required for the policy to be implemented (Fowler, 2012). Through formal evaluations of the Academic Potential Project model both by the Suburban District’s Office of Research and Evaluation and by a local university’s researchers, validation of the model’s primary goals and strategies designed to reform practice in the gifted education program as it related to underrepresentation were validated and, through the Superintendent’s and the school board’s actions adopted as official components of the Suburban District’s gifted education program.
Implementation

Policy implementation depended upon district administrators, principals and classroom teachers (Fowler, 2012). The task of motivating educators to implement the new policies began with the professional development opportunities that exposed teachers to leaders in the field of gifted education pedagogy and gifted students from underrepresented populations. This exposure created an openness to change in the district’s gifted education program including the adoption of multiple criteria for identification, and the moving from the pullout to the collaborative teaching model. Another motivating factor was the transformational leadership style of the district’s Gifted Education Program Coordinator.

Evaluation

Evaluation, a form of applied research (Fowler, 2012), is necessary to determine if polices are working as they should. In the Suburban District’s Gifted Education Program, both quantitative and qualitative data is regularly collected and mined to determine how to best support students, to use as an advocacy tool and to identify areas for program growth.

Conclusion

To effectively advocate for policy that creates a college pipeline for low-income high ability students will require creating pathways to access opportunities for academically challenging experiences. Doing so may positively impact the racial and socio-economic achievement gap. While there is agreement regarding the need for the public education system to equip students to meet higher standards, consensus is lacking as to how these goals should be achieved. For the students from African American,
Latino and Native American populations, especially if from economically stressed communities, meeting this need is more challenging, and must be pursued with consideration for the role of family, culture, friendship, childhood, accidents of birth, history and geography on his or her personal context (Horowitz, Subotnik, & Matthews 2009). The Suburban District provides a model that appears to gets it right.
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Appendix A

Review of District’s Gifted Program: VDOE Standards

Table A1

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>VDOE Regulation Requirement</th>
<th>Suburban District Gifted Program Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program</strong></td>
<td></td>
<td>Meets</td>
</tr>
<tr>
<td></td>
<td>• A local plan has been developed and approved.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Program philosophy and goals are stated.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• At least one area of giftedness is identified and served.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Program components are aligned</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Continuity of services is provided K-12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• An advisory committee has been appointed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• A report is developed annually</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The school division provides assurances that the regulations are met</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Information about the program is public</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• K-12 students are screened</td>
<td>Meets</td>
</tr>
<tr>
<td></td>
<td>• Multiple identification criteria are collected</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Multiple sources may submit referrals, such as parents, peers, self, community, teachers, etc.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Committees are formed for screening and identification.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• A timeline is in place and is communicated to parents.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Notice is provided and parental consent is obtained.</td>
<td></td>
</tr>
<tr>
<td><strong>Identification</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Curricula and instruction are delivered.</td>
<td>Exceeds</td>
</tr>
<tr>
<td></td>
<td>• Advanced courses are offered to students.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Growth is measured and reported to parents.</td>
<td></td>
</tr>
<tr>
<td><strong>Curriculum</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Professional Development</strong></td>
<td></td>
<td>Exceeds</td>
</tr>
<tr>
<td></td>
<td>• Professional development is provided to teachers</td>
<td></td>
</tr>
</tbody>
</table>

Content indicates whether the district met or exceeded Virginia Department of Education standards. Adapted from the review of the Suburban District’s Gifted Education Program by local university researchers, 2013
## Appendix B

### Review of District’s Gifted Program: NAGC Standards

#### Table B2

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Standard</th>
<th>Indicator</th>
<th>Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification Procedures</td>
<td>Identification</td>
<td>• Equal Access • Comprehensive Assessment • Opportunity to demonstrate unique gifts • Representation of Diversity</td>
<td>Meets</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>Curriculum, Instruction and Assessment</td>
<td>• Multiple curricula • Measuring Growth • Multiple Domains • Multiple Skills • Access to Resources Independent Investigations</td>
<td>Exceeds</td>
</tr>
<tr>
<td>Teacher Certification and Professional Development</td>
<td>Preparation</td>
<td>• Access to PD • Life-long learning • Ethical practices • Available courses • All GT teachers endorsed</td>
<td>Meets</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td>Programming</td>
<td>• Variety of options • Comprehensiveness • Coordinated Services • Collaboration • Adequate support • Policies and Procedures • Career Pathways</td>
<td>Exceeds</td>
</tr>
<tr>
<td>Learning Environment</td>
<td>Personal, social, and cultural competence</td>
<td>Meets</td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>Development</td>
<td>Cognitive and Affective Growth</td>
<td>Meets</td>
<td></td>
</tr>
<tr>
<td></td>
<td>More communication with parents</td>
<td>To Improve</td>
<td></td>
</tr>
<tr>
<td></td>
<td>More focus on students’ affective needs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Content indicates whether the district met or exceeded National Association for Gifted Children standards. Adapted from the Review of the Suburban District’s Gifted Education Program by local university researchers, 2013.
Appendix C

Levels of Educational Policy for Gifted Education

Table C3

<table>
<thead>
<tr>
<th>Active Players</th>
<th>Examples of Major Emphasis</th>
<th>Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Governors *State Departments of Public Instruction</td>
<td></td>
<td>*Residential School Boards *State Associations of Educators/ Parents *Governors Schools’ Boards</td>
</tr>
<tr>
<td><strong>Federal</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table indicates the levels of policy impacting gifted education and groups and organizations at each level for collaboration and advocacy. Adapted from Political Issues in Gifted Education by J. Gallagher, 2015. Copyright 2015 by the Journal for the Education of the Gifted, 38(1), 77-89.
Appendix D

Federal Policy and Legislation Regarding or Impacting Gifted Education

Table D4

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1950</td>
<td>National Science Foundation Act formed National Science Foundation and provided funding for research and support of math and science education.</td>
</tr>
<tr>
<td>1958</td>
<td>Following the Soviet Union's launching of the first satellite (Sputnik) in 1957, Congress declared an educational emergency and enacted the National Defense Education Act (P.L. 85-864), which allocated funds to develop potential for talent in math, science, and foreign languages.</td>
</tr>
<tr>
<td>1965</td>
<td>The Elementary and Secondary Education Act (P.L. 89-10) passed in Congress; Titles III and V related to the development of model gifted programs and the hiring of state-level gifted education personnel.</td>
</tr>
<tr>
<td>1968</td>
<td>President Johnson established a White House Task Force on the Gifted and Talented; the formal report was never published, but a 50-state survey was completed.</td>
</tr>
<tr>
<td>1969</td>
<td>Federal bills were introduced in both houses of Congress that would have established a federal definition, provided support to states to expand programs, and directed the U.S. Commissioner of Education to conduct a study on the needs of the gifted.</td>
</tr>
<tr>
<td>1970</td>
<td>Federal bills introduced in 1969 were included a section 806 of the Elementary and Secondary Educational Amendments of 1969 (P.L. 91-230), which mandated a report to Congress on the status of and need for programs for the gifted.</td>
</tr>
<tr>
<td>1973-1974</td>
<td>Several federal bills introduced in both houses of the 93rd Congress resulted in the establishment of an Office of Gifted and Talented in the U.S. Office of Education, annual appropriations for the office, grants for training, research and demonstration projects, grants to state and local agencies, and the establishment of a national clearinghouse related to gifted.</td>
</tr>
<tr>
<td>1975</td>
<td>Only $2.5 million was appropriated for federal efforts; funding remained at this level for several years.</td>
</tr>
</tbody>
</table>
1977-1978
Federal bills supporting the education of the gifted and talented were again introduced in both houses of Congress. The proposed Gifted and Talented Children's Education Act (P.L. 95-561) passed as Title IX-A of the Education Amendments of 1978.

1978-1980
Appropriations increased from $3.8 million to $6.2 million in 1980. President Carter supported continuing $6.2 million funding.

1981
Congress provided $5.6 million in fiscal year 1981. The consolidation and improvement provisions of the Omnibus Budget Reconciliation Act of 1981 consolidated 20 programs into a Chapter 2 block grant for state and local educational agencies; funding decreased 42% for programs.

1982-1983
The National Commission on Excellence was established; hearings were held around the country on six aspects of public education including gifted education; the National Business Consortium was established to put business and education into a partnership for the promotion of education of the gifted.

1983
The report of the National Commission on Excellence in Education, titled A Nation at Risk: The Imperative for Education Reform, was published; education of the gifted was mentioned in several sections.

1983-1984
In the 98th Congress, the Senate established a caucus on children that explored (among other issues) the impact of federal budget cuts on highly talented children, especially special populations.

1987-1988
Both houses of Congress overwhelmingly passed virtually identical bills regarding education of the gifted. The Senate passed House Omnibus Bill, S. 373. The House bill was also included in the House Omnibus Bill, H.R. 5. Funding of $7.9 million was appropriated for the reestablishment of a Federal Office of Gifted and Talented, for grants for training and demonstration projects, for grants to state and local agencies, and for the establishment of a National Research Center.

1988
The Javits Gifted and Talented Students Act of 1988. Passed as part of ESEA, this is the only federal program dedicated to the development of gifted and talent. Funds do not fund local programs but are intended to carry out a coordinated program of scientifically based research, demonstration projects, and innovative strategies.

2001
No Child Left Behind revision of the Elementary and Secondary Education Act of 1965 (ESEA) passed. The focus on proficiency for all thought to be demonstrable through high stakes testing was thought to harm gifted students’ development.
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>American Competitiveness Initiative focuses on research and development in STEM disciplines representing a sustained investment of approximately $137 billion in investment –the largest since the Apollo Space program in the 1960s.</td>
</tr>
<tr>
<td>2010</td>
<td>Race to the Top. Federal stimulus funding to school districts that included college and career readiness as requirement for states to receive funding.</td>
</tr>
<tr>
<td>2015</td>
<td>Every Student Succeeds Act most recent revision of the Elementary and Secondary Education Act of 1965 (ESEA) that includes provisions and retained the Javits Gifted and Talented Students Education Program</td>
</tr>
</tbody>
</table>

Appendix E

Interview Participants

Table E5

<table>
<thead>
<tr>
<th>Participant</th>
<th>Date of Interview</th>
<th>Position/Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11/21/16</td>
<td>District’s Gifted Education Coordinator</td>
</tr>
<tr>
<td>2</td>
<td>11/21/16</td>
<td>Gifted Resource Teacher, Elementary</td>
</tr>
<tr>
<td>3</td>
<td>11/21/16</td>
<td>Educational Specialist, Gifted Instructional Services Department, Elementary</td>
</tr>
<tr>
<td>4</td>
<td>11/21/16</td>
<td>Gifted Resource Teacher, Elementary</td>
</tr>
<tr>
<td>5</td>
<td>11/27/16</td>
<td>Gifted Resource Teacher, Elementary</td>
</tr>
<tr>
<td>6</td>
<td>11/28/16</td>
<td>Gifted Resource Teacher, Elementary</td>
</tr>
<tr>
<td>7</td>
<td>11/28/16</td>
<td>Principal, Elementary</td>
</tr>
<tr>
<td>8</td>
<td>11/28/16</td>
<td>Gifted Specialist</td>
</tr>
<tr>
<td>9</td>
<td>11/30/16</td>
<td>Principal, Elementary</td>
</tr>
<tr>
<td>10</td>
<td>12/1/16</td>
<td>Educational Specialist, Gifted, Instructional Services Department, Elementary</td>
</tr>
<tr>
<td>11</td>
<td>12/1/16</td>
<td>Asst. Principal</td>
</tr>
<tr>
<td>12</td>
<td>12/2/16</td>
<td>Principal</td>
</tr>
<tr>
<td>13</td>
<td>12/2/16</td>
<td>Gifted Resource Teacher</td>
</tr>
<tr>
<td>14</td>
<td>12/3/16</td>
<td>Principal</td>
</tr>
</tbody>
</table>

Participant roles and dates of interviews.
<table>
<thead>
<tr>
<th>Name of Document</th>
<th>Date of Document</th>
<th>Type of Document</th>
<th>Document Location</th>
<th>Relevance</th>
<th>Primary or Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes Regular Meeting No. 7</td>
<td>November 7, 2002</td>
<td>Minutes</td>
<td>District file</td>
<td>Commendation of District Gifted Coordinator and Elementary School Team and Instructional Services staff members, for their hard work on recent boundary meetings for the new elementary schools and Gifted and Talented (GT) centers; To the Assistant Superintendent of Instructional Services, and her staff, for the responses to the Gifted and Talented Advisory Committee annual report; it was described as one of the most constructive responses the Superintendent had ever seen to a School Board advisory committee</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Minutes Regular Meeting No.14</td>
<td>March 3, 2003</td>
<td>Minutes</td>
<td>District file</td>
<td>Opening of 6 new gifted centers due to increased demand; Discussion of opening of center at Clearview elementary with community requesting it open with both 3rd and 4th grade due to the concern that Forest Edge may be left with too few 4th graders.</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Academic Potential Project Model First Interim Evaluation Report</td>
<td>March 2006</td>
<td>First Interim Evaluation Report</td>
<td>District file</td>
<td>Implementation listed as strength and greatest opportunity for improvement. Areas of suggested improvements:</td>
<td>Primary Q2</td>
</tr>
</tbody>
</table>

- Establishment and consistency of guidelines for management and administration of the implementation of the APP model.
- Consistency of the student identification
Need for additional resources to implement fully the model and support staff development.

Continuous revision of the curriculum to be responsive to the learning needs of diverse students.

Gifted and Talented Advisory Committee (GTAC) Annual Report (Exhibit A)

- Question about the difference between gifted and highly gifted and whether a program could be devised to meet the needs of the highly gifted; response that staff was coming up with a definition as some parents were concerned that students at the higher end may not have all the opportunities they need to excel;
- Student participation in the Gifted and Talented (GT) program had increased from 6% to 12%, and the Committee had not seen any erosion of student performance since opening the door to additional students;
- Question about opportunity for equal access to math with reference to Advanced Placement/International Baccalaureate programs; response that Black and Hispanic students were not doing very well in either program;
- Request that in the future the Committee present the Board with the pros and cons of the issues instead of only their
conclusions; discussion about comparisons in maths and sciences and college credits; suggestion that Committee members meet with the Advisory Committee for Students with Disabilities and begin a dialogue between the joint committees; affirmative response;  
• suggestion that differences between school-based GT centers and center-based programs be clarified for parents;  
• discussion about middle school honors math and the need to inform parents at the elementary level about accelerated math in elementary school; important to get information to parents as early as possible; and  
• question about more discussion at a future work session about growth and assessment of Academic Potential Project and other GT programs; affirmative response.

<table>
<thead>
<tr>
<th>Memo from Superintendent to School Board Re: Staff Response to 2007 Gifted and Talented Advisory Committee Report Academic Potential Project Model Second Interim Evaluation Full Report Suburban District Public Schools Office of Program</th>
<th>September 10, 2007</th>
<th>Memo</th>
<th>District file</th>
<th>Primary Q1</th>
</tr>
</thead>
</table>
| Recommended:               | Based on findings for school year 2005-06 and part of 2006-07, OPE recommends that implementation of the APP model continues with the following modifications: GT Programs Office:  
• Define APP model objectives and |

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Evaluation outcomes with expected levels of improvement, performance, and participation for students.

- Continue to define and update the roles of all stakeholders and keep them informed about the criteria and selection process for YS students.
- Continue to monitor student progress and the concerns of principals, teachers, and parents.
- Continue to provide and improve on professional learning and training for teachers, and continue to monitor the level of staffing and requirements to increase staffing.

Office of Budget Services and GT Programs Office:

- Improve the estimate of annual costs based on the number of anticipated YS students.
- Investigate whether it is more cost effective to conduct lower-level implementation at several sites or higher-level implementation at fewer sites based on school interests and the need for more consistent implementation across sites.
- Establish a budget to support APP model objectives and outcomes.

Leadership Team and School Board:

- Given the continuous progress toward the 12 program components, it is recommended that the evaluation of the YS be discontinued for the 2007-08 school year, with technical assistance from the
<table>
<thead>
<tr>
<th>Plans and Programs Tied to Closing the Minority Student Achievement Gap in Suburban District</th>
<th>2009 - 2010</th>
<th>Document</th>
<th>District file</th>
<th>OPE to report future outcomes as part of the ISD operational goals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes from Work Session No. 120/Instruction</td>
<td>June 8, 2009</td>
<td>Minutes</td>
<td>District file</td>
<td>Identifies specific challenges related to the educational opportunities available to Black&amp; Hispanic students with specific action steps, timelines, contact people to accomplish the tasks necessary to increase academic rigor and close opportunity gaps. Academic Potential Project as central strategy.</td>
</tr>
<tr>
<td>Minutes from Work Session No. 6/Instruction</td>
<td>July 13, 2009</td>
<td>Minutes</td>
<td>District file</td>
<td>Sally Reis, PhD gave presentation on research-based best practices in Gifted Educations followed by Q &amp; A on pedagogy, Level IV and center-based programs</td>
</tr>
<tr>
<td>School Board Presentation: Gifted Education Programs</td>
<td>October 7, 2009</td>
<td>Presentation</td>
<td>District file</td>
<td>Discussion of K- HS identification procedures, service delivery, curriculum, PD, family &amp; community involvement; piloting open enrollment in MS; discussion of need for Level IV services both at centers and schools</td>
</tr>
<tr>
<td>Closing the Minority Student Achievement Gap in Suburban District: Plan Scope and Resourcing Definition</td>
<td>November 10, 2010</td>
<td>Report</td>
<td>District file</td>
<td>Presentation of local plan for gifted and how program components meet requirements of the plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Identifies specific challenges related to the educational opportunities available to Black&amp; Hispanic students with specific action steps, timelines, contact people to accomplish the tasks necessary to increase academic rigor and close opportunity gaps. Academic Potential Project as central strategy.</td>
</tr>
<tr>
<td>Program</td>
<td>Year</td>
<td>Type</td>
<td>Source</td>
<td>Details</td>
</tr>
<tr>
<td>---------</td>
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<td>--------</td>
<td>--------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Programs and Initiatives Tied to Closing the Gap in Suburban District</td>
<td>2010-2011</td>
<td>Report</td>
<td>District file</td>
<td>Identifies specific challenges related to the educational opportunities available to Black &amp; Hispanic students with specific action steps, timelines, contact people to accomplish the tasks necessary to increase academic rigor and close opportunity gaps. Academic Potential Project as central strategy.</td>
</tr>
<tr>
<td>Programs and Initiatives Tied to Closing the Gap in Suburban District</td>
<td>2011-2012</td>
<td>Report</td>
<td>District file</td>
<td>“ “</td>
</tr>
<tr>
<td>Closing the Minority Student Achievement Gap in Suburban District: Plan Scope and Resourcing Definition</td>
<td>March 8, 2011</td>
<td>Report</td>
<td>District file</td>
<td>“ “</td>
</tr>
<tr>
<td>Academic Potential Project Handbook USDOE Office for Civil Rights: Civil Rights Data Collection</td>
<td>March 12, 2012</td>
<td>USDOE Document</td>
<td>USDOE</td>
<td>Summary of USDOE data tool for analyzing equity and educational opportunities indicating comparison of Suburban District with other District’s nationwide</td>
</tr>
<tr>
<td>Work Session No. 106/Instruction</td>
<td>April 16, 2012</td>
<td>Minutes</td>
<td>District file</td>
<td>Presentation on continuum of services, benefits of offering more challenging curriculum; provides a demographic &amp; geographic breakdown of the 18 percent of students in grades 3-8 in Level IV during</td>
</tr>
<tr>
<td>Source</td>
<td>Date</td>
<td>Type</td>
<td>Details</td>
<td>Year</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
<td>------------</td>
<td>------------------------------------------------------------------------</td>
<td>------</td>
</tr>
</tbody>
</table>
| Letter of Findings  
USDOE Office of Civil Rights | May 25, 2012 | Letter | USDOE archived file  
Outlines findings regarding 2003 complaint against Suburban District alleging discrimination against White students regarding admission to flagship magnet school | FY 2012 | Q2       |
| Minority Advocacy Group and NAACP OCR Complaint | July 23, 2012 | Letter | Advocacy Website; USDOE archives  
Complaint against the Suburban District “regarding discriminatory admission policies” for nationally recognized STEM high school.  
Describes complaint and interviews complainants and community members | July 23, 2012 | Q2       |
| National Newspaper article Minority Advocacy Group and NAACP OCR Complaint  
International network television interview | July 23, 2012 | Article  
Link to blog and video | Minority Advocacy Group webpage  
link to national newspaper cite  
Video of interview of advocacy group president with national reporter. Describes complaint and discusses diversity in America’s schools | July 23, 2012 | Q2       |
| Local affiliate of national network television interview | July 24, 2012 | Link to video | Online content  
Video of story about advocacy group and NAACP filing of OCR complaint | July 24, 2012 | Q2       |
OCR Complaint No. XXXXX  
Notification/Partial Dismissal Letter indicating that because OCR has jurisdiction over African American and Latino students, they would be opening that portion of the complaint for investigation.  
Discussion of two possible motions presented as new business on December | September 25, 2012 | Q1       |
| Work Session No.65/Instruction | January 14, 2013 | Minutes | District file  
Discussion of two possible motions presented as new business on December | January 14, 2013 | Q1       |
2012, which would: authorize the establishment of three new Gifted Education program (G&T) elementary school centers to relieve overcrowding in existing centers, and the exploration of expanding G&T elementary and middle school centers to five new sites in fall 2013

Board identified key issues to be included in the Gifted Education Program analysis report scheduled for completion by June 30, 2013;

Staff to provide information including:

- a historical account of the identification practices that encompasses the significant increases in G&T eligibility;
- the full spectrum of all levels of services, not just at centers;
- recommendations for examining consistency of implementation across all schools;
- G&T delivery and its connection with the Middle Years International Baccalaureate program and the middle school honors class critical mass analysis and connection to delivery methodology and quality of staffing;
- G&T teacher certifications, both Suburban District and best practices, and the number of staff certified;
- G&T services in neighborhood schools, including transportation
• impact of the Academic Potential Project program on G&T eligibility, implementation of advanced math across county, use of external assessments for eligibility, and successful programs used in other jurisdictions; and
• alternative certification approaches; Discussed staff presentation of proposed changes to the scope of the analysis of the Suburban District continuum of Gifted Education Services;

Consensus on the following changes to the scope of the analysis:

Focus Area #1, Suburban District Identification Procedures:
• Add comparison to other districts in guiding question;
• Add “potential” in front of “expansion” in third guiding question regarding recommendation for improvement and expansion;
• Include why/how Suburban District customizes and uses various assessments for eligibility;

Focus Area #2, Quality of Program Services:
• add “continuum of service”

Focus Area #3, Curriculum and Instruction:
clarify in Section 1.ii. that the question is whether the International Baccalaureate Middle Years Program has comparable curriculum to middle school Gifted Education Program (G&T) centers;

add new Section 1.iv.: “Develop methodology to evaluate G&T centers’ delivery of expected curriculum and instruction”

<table>
<thead>
<tr>
<th>Programs and Initiatives Tied to Closing the Gap in Suburban District</th>
<th>April 2013</th>
<th>Document</th>
<th>District file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifies specific challenges related to the educational opportunities available to Black&amp; Hispanic students with specific action steps, timelines, contact people to accomplish the tasks necessary to increase academic rigor and close opportunity gaps. Academic Potential Project as central to strategy.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2013 Review of the Gifted Education Programs - Report for the Gifted Education Programs Program Review</th>
<th>June 2013</th>
<th>Report</th>
<th>District file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given the increase in enrollment in Suburban District-GT and the potential expansion of Middle School Centers, the Suburban District School Board requested that Suburban District-GT be reviewed in four focus areas: • Identification Procedures • Curriculum and Instruction • Teacher Certification and Professional Development • Quality of Program Services</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minutes Work Session No. 133/Instruction</th>
<th>June 27, 2013</th>
<th>Minutes</th>
<th>District file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion of local university staff review; • Reviewed key findings and recommendations regarding: identification procedures, curriculum and instruction, teacher</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
certification and professional
development, and quality of program
services

Staff would provide the following additional information:

- the Level IV percentages from comparable districts;
- the Level IV demographics data by school and student demographics of comparable districts, including education levels of parents;
- a comparison of different G&T centers;
- the increase of G&T students in Suburban District in the last ten years;
- resource needs for teacher certifications for all G&T teachers;
- a timeline on how to move forward with communicating any recommendations, including a plan for community engagement;
- a plan for in-depth review of fidelity of implementation;

- Discussion of the School Board’s follow-up questions from the June 27, 2013, School Board work session regarding the Suburban District Gifted Education Programs (G&T) Review that was conducted by local university staff;
- Staff to provide additional information including:
  - add to the campus analysis the percentage of students participating in
Level IV center-based and Local Level IV services;
o add to 10-year analysis, the numbers and percentages of students for Level IV centers and Local Level IV services;
o provide further analysis regarding the increase in the percentage of students declining services, including a breakdown by campus and potential reason;
o develop a process for evaluating both access and program quality for all schools, including a special emphasis around the evaluation of G&T programming in schools with higher percentages of free and reduced-price meal and student diversity; the evaluation should be based upon quality program standards, best practices, and school/classroom observations;
o evaluate G&T staffing for all schools and determine costs for adding this support to those without these positions;
o develop a recommendation and timeline for addressing schools where overcrowding was a pressing issue;
o schedule a fall work session for the School Board to continue to discuss future next steps for G&T.

<p>| School Efficiency Review of Suburban District Public Schools | September 2013 | Report | District file | Includes description of the G&amp;T program with detailed explanation of Academic Potential Project | Primary Q2 |
| Voluntary Resolution | December 11, 2013 | District file | Voluntary resolution agreement (Agreement) to resolve OCR Complaint | Primary Q1 |
| --- | --- | --- | --- | --- | --- |
| Review of the Gifted Education Program Suburban District Public Schools APP: A Model for Success Newsletter | June 27, 2013 | Presentation to School Board | District file | PowerPoint presentation of research and findings on Academic Potential Project by local university researchers | Secondary Q2 |
| 2014 DC Beat The Odds® Student A (Latina ELL girl) | November 2014 | Video | Children’s Defense Fund video | Video of Academic Potential Project student autobiographical video | Primary Q2 |
| Academic Potential Project Program Profile | 2014-2015 | Program document | District file | Provides program overview, student summary, number &amp; location of sites, approved materials &amp; assessments, current &amp; future focus, data summary, locations “ “ | Secondary Q1 |
| Academic Potential Project Program Profile Suburban District Strategic Plan | 2015-2016 | Program document | District file | Academic Potential Project listed as means to close the achievement gap by | Secondary Q1 Primary |
| 2015 - 2020 | Document | District file | | | |</p>
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia Department of Education State Fiscal Stabilization Fund Indicator (C)(12) Report 2008 FGI cohort year (students entering high school in 2004) 6-yr Graduation Rate</td>
<td>March 4, 2016</td>
<td>VDOE</td>
<td>VDOE document indicating the total number of students in Suburban District cohort who graduated from high school with a federally recognized diploma and enrolled in a public IHE and/or private non-profit IHE in Virginia within 16 months</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Fall Institute Student presentation (Boy ELL Learner)</td>
<td>September 1, 2016</td>
<td>Video</td>
<td>Student Presentation video</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Academic Potential Project video STEAM Center</td>
<td>Sep 12, 2016</td>
<td>Video</td>
<td>District video file STEAM Innovation at an Elementary School</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Academic Potential Project Principals Meeting</td>
<td>October 17, 2016</td>
<td>Video</td>
<td>District video file Video of Academic Potential Project student autobiographical video</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Regulation 3335.8 Instructional Services Office of PreK-12 Curriculum and Instruction</td>
<td>October 18, 2016</td>
<td>Document</td>
<td>District file Most recent revision to Suburban District regulation 3335 policy originally adopted: July 1, 1986 Corrected: June 14, 1994 Revised: January 27, 2009 Review: April 24, 2014</td>
<td>Secondary Q1</td>
</tr>
<tr>
<td>Academic Potential Project overview</td>
<td>December 7, 2016</td>
<td>Video</td>
<td>District video file Overview video Academic Potential Project</td>
<td>Primary Q2</td>
</tr>
<tr>
<td>Suburban District Local Plan for the Education of the Gifted 2016-2021</td>
<td>2016 – 2021</td>
<td>Local Plan</td>
<td>District file</td>
<td>As required by 8 VAC 20-40-60A, school-board approved comprehensive Local Plan for the education of the gifted that includes the components identified in the regulations. The Academic Potential Project’s role in the plan is detailed. Targeting XXXX Elementary to address low rates of access and participation for Black and Hispanic students receiving Level II, III, and IV services. Lack of teacher training regarding advanced math curriculum and the importance of access for Black and Hispanic students. Low percentage of Black and Hispanic students identified as Academic Potential Project. Lack of training and support for classroom teachers in using research-based curriculum and resources that teaches critical and creative thinking to all students.</td>
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</tbody>
</table>
Low numbers of Black and Hispanic students enrolled in Algebra I and World Languages in eighth grade
Low numbers of Black and Hispanic students concurrently enrolled in AVID and AP/IB/Honors courses
Lack of support and advocacy for Academic Potential Project through elementary-middle transition and middle-high transition

<table>
<thead>
<tr>
<th>Level IV Gifted Services: A Historical Perspective</th>
<th>n. d.</th>
<th>Program document</th>
<th>District file</th>
<th>Description of Level IV Gifted Services in Suburban District</th>
<th>Secondary Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation for New Members</td>
<td>n.d.</td>
<td>Orientation Presentation</td>
<td>District file</td>
<td>Overview of Suburban District Gifted Education Program Levels I – IV</td>
<td>Secondary Q1</td>
</tr>
<tr>
<td>Academic Potential Project Model</td>
<td>n. d.</td>
<td>Program document</td>
<td>District file</td>
<td>Description of Academic Potential Project model</td>
<td>Primary Q1</td>
</tr>
<tr>
<td>Academic Potential Project Resource Center</td>
<td>n.d.</td>
<td>Professional Development resources</td>
<td>Web-based District files</td>
<td>Suburban District and Professional development company partnered to offer this extensive multimedia resource center and an online graduate level course comprised of four modules that enable schools to adapt the Academic Potential Project model to meet the needs of traditionally underrepresented populations in their own district. (Professional development company founded with research university, now independent nonprofit organization)</td>
<td>Secondary Q1 Q2</td>
</tr>
</tbody>
</table>
| Title                                                                 | Date/Location | Type                  | Location      | Relevance to Research Questions and Source
|---------------------------------------------------------------------|---------------|-----------------------|---------------|-----------------------------------------------|
| Finding and Nurturing Gifted Potential in Academic Potential Project | n.d.          | Presentation          | District file | PowerPoint presentation that offers Academic Potential Project program overview detailing philosophy, foundational research, continuum of services, issues affecting underrepresented gifted students, short-term and long-term goals used and adapted for various conference settings including NAGC; SC Consortium for Gifted
| Pathways to Gifted Education Programs Endorsement for Elementary Teachers | n.d.          | Flyer/Professional Development | District file | Suburban District regulation 3335 statement requiring endorsement; description of endorsement program for elementary teachers; and application
| Pathways to Gifted Education Programs Endorsement for Secondary Teachers | n.d.          | Flyer/Professional Development | District file | Suburban District regulation 3335 statement requiring endorsement; description of endorsement program for secondary teachers; and application
| Referral Form for Level II Gifted Services, Differentiated Services and Academic Potential Project | n.d.          | Form                  | District file | Form used by identification committee to determine level of services that includes Gifted Behaviors Continuum & GBRS Connection
| Gifted Behavior Rating Scale with Commentary | n.d.          | Form                  | District file | A Gifted Behaviors Rating Scale with Commentary (GBRSw/C) is required for screening for full-time Gifted Education Programs (GT) (Level IV) placement.

Table indicates type and location of documents accessed, relevance to research questions and whether the source was primary or secondary.
Appendix G

Interview Questions and Introductory Script

Thank you for taking the time to meet with me today. The purpose of this interview is to gain a better understanding of policy and practice and events leading up to and following the initiation of the Academic Potential Project model.

Some of the questions below may be asked of you during our interview:

1. During which years between 2001 through 2015 were you or any other school officials involved in the implementation of the Academic Potential Project in the Suburban District public schools? What was the nature of the role? Did you have any other roles?

2. Were you or any other school officials to your knowledge involved in the Suburban District’s Gifted Education Program’s development of the Academic Potential Project and/or the ensuing policy debates and policymaking process that led to its development? [POLICY/PRACTICE]

3. Describe those activities that you believe were effective in addressing the problem of underrepresentation. [PRACTICE]

   Why do you think they were effective? [PRACTICE]

4. Describe those activities that you believed were ineffective in addressing the problem. [PRACTICE]

   Why do you think they were ineffective? [PRACTICE]

5. Did other documents, policies or policy language impact the writing of the plan for the Academic Potential Project? [POLICY]

6. Can you speak to your understanding of the “multiple criteria” for selection as practiced in the Suburban District? [PRACTICE]
7. What are some reasons that might explain how Academic Potential Project has survived and grown in since its inception? [PRACTICE]

8. What challenges have been encountered in the efforts to expand the Academic Potential Project, and how have these challenges been addressed? [PRACTICE]

9. How has the annual state funding affected the Advanced Potential Project implementation? [POLICY]

10. How, if at all, has the Advanced Potential Project changed through the years and what, if anything, motivated the changes? [PRACTICE]

11. What, if any, influence do you think federal and state policies, have on identification, referral and classification practices? [POLICY]

12. What, if any, further steps do you think the Suburban District should take to address the underrepresentation in its gifted education programs? [PRACTICE]
Appendix H

Results Chart

Table H7

**Research Question 1:** How, if at all, did the nature of federal, state and local policies, and their associated mandates to change practice, impact the underrepresentation of African American, Native American, Latino and/or low income students in gifted education programs within the context of one diverse school district?

<table>
<thead>
<tr>
<th>Theme Descriptions</th>
<th>Relevant Literature</th>
<th>Policy Issue</th>
<th>Level of Policy</th>
<th>Data Source</th>
<th>Data Collection Method</th>
<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed to Address Underrepresentation in Gifted Education</td>
<td>In the United States, from elementary to secondary to post-secondary school, African American, Native American and Latino students are underrepresented among those achieving at the highest levels (Ford &amp; Whiting, 2008; L. Miller, 2004; Olszewski-Kubilius &amp; Clarenbach, 2012). As is reflected in American society, many students from the aforementioned populations are from low-income families (L. Miller, 2004; Plucker, Burroughs, &amp; Song, 2010).</td>
<td>*No federal mandate for gifted education</td>
<td>Federal</td>
<td>*Educational Literature</td>
<td>*Review of peer-reviewed research articles and other documents</td>
<td>VN810046 Gifted Resource Teacher, Elementary: My principal just gave us a very good quote. She said “there’re a lot of people in the world who are full of potential...,” Code-Closing Opportunity Gap VN810052 Elementary Principal: Participant: Sure, I think...</td>
</tr>
</tbody>
</table>
Upon examination of the relationship between state policies and the distribution of educational opportunity, Baker and Friedman-Nimz (2004), found that more funding, in general, and more funding for gifted education, in particular, was available in schools with fewer students from families with low incomes.

there are multiple layers to that...

Code-Closing Opportunity Gap

VN810044 Gifted Resource
You know, I have to say that we're fortunate that we have enough funding
Code-Budget as Policy

VN810046 Gifted Resource
Teacher, Elementary: Frankly, I think we've done a lot with very little...
Code-Budget as Policy

VN810049 Gifted Resource
Teacher, Elementary: I just think that it's
important that state and federal policy explicitly support the whole question...

Code-Budget as Policy

VN810049
Educational Specialist
Gifted Instructional Services
Department, Secondary:
Funding for us for open access is critical around paying for all the students’ AP and IB tests...

Code-Budget as Policy

VN810049
Educational Specialist
Gifted Instructional Services
Department, Secondary:
Same thing with the students’ grant. That was just last year that we connected the grant funding to the support..

**Code-Budget as Policy**

**VN810043**  
District Gifted Ed.  
Coor.: Three years ago, that would be in 2014 I believe, the school board did move to give us $500,000 to support a full-time resource teacher in every... s.

**Code-Budget as Policy**

<table>
<thead>
<tr>
<th>Theme Descriptions</th>
<th>Relevant Literature</th>
<th>Policy Issue</th>
<th>Level of Policy</th>
<th>Data Source</th>
<th>Data Collection Method</th>
<th>Quotes</th>
</tr>
</thead>
</table>

284
<table>
<thead>
<tr>
<th>Aspects of Academic Potential Project Model supported by research or other educational literature (Hinson &amp; R. Harris, 2007 as referenced in Bland et al., 2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Best practices for identifying and nurturing gifted potential in all populations through a focus on talent development (Bernal, 2002; Elliott, 2003; Frasier &amp; Passow, 1994; Van Tassel-Baska, D. Johnson, &amp; Avery, 2002; Olszewski-Kubilius &amp; Clarenbach, 2012).</td>
</tr>
</tbody>
</table>

<p>| Research-based curriculum | Local Literature | *Review of peer-reviewed research articles and other documents |</p>
<table>
<thead>
<tr>
<th>Local</th>
<th>State</th>
<th>Federal</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Educational Literature</td>
<td></td>
<td></td>
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<tr>
<td>*District Administrators</td>
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</tbody>
</table>

*Interviews

---

**Educational Literature**

*District Administrators*

---

**VN810046**

**Elementary Gifted Resource Teacher:** So, for example, we do look at test scores. We look at grades. We look at work samples... or test scores.

**Code-Multiple Criteria**

**VN810054**

**Elementary Asst. Principal:** Another part of it, too, all along the way, the Coordinator has always done research and ran her numbers ...

**Code-Data**

**VN810051**

**Educational Specialist Gifted Instructional Services Department, Secondary:** I think that's...
really where the challenge has come and how we’ve hurdled ... ate a lot of that.

**Code-Data**

**VN810050**
**Elementary Principal**
And as far as during the school year, we’re really looking to make sure ... here with children who

**Code – Strengths-focused**

**VN810048**
**Gifted Elementary Resource Teacher:**
Writing those comments, which can be like a page about specific strength-based behaviors

**Code-Access, Affirmation Advocacy**

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<table>
<thead>
<tr>
<th>Theme Descriptions</th>
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</thead>
<tbody>
<tr>
<td>Aspects of Academic Potential Project Model supported by research or other educational literature (Hinson &amp; R. Harris, 2007 as referenced in Bland et al., 2013)</td>
<td>VanTassel-Baska (2005) described policies regarding acceleration, differentiated curriculum, differentiated instruction, and appropriate assessment as “nonnegotiables” for talent development in schools. She suggested that these policies be enacted in order to ensure that sensitive periods for development are not missed. Teacher Professional development is vital to ensuring that teachers are equipped to offer students this instruction and support. Frank (2007) demonstrated the potential for professional development to address issues of deficit mindset in teachers that may impact identification for gifted education services.</td>
<td>*Identification, *Differentiated Curriculum, *Special Classes, *Acceleration</td>
<td>Local</td>
<td>*School Boards, *Superintendents, *District Administrators, *Teachers, *Parent Advocates</td>
<td>*Interviews, *Record Review</td>
<td>VN810044 Gifted Resource Teacher, Elementary: …it’s related to something that we call the Gifted Behaviors Rating Scale... Code-Multiple Criteria VN810048 Gifted Resource Teacher, Elementary: Right. All GTRTs, beginning over the past few year, were required to have cultural...</td>
</tr>
</tbody>
</table>
competency training...
Code-Professional Development

VN810049
Gifted Resource Teacher, Elementary: I think they’ve been effective because ... I think it all starts with awareness ... Co-de-Professional Development

VN810049
Gifted Resource Teacher, Elementary: By the GRTTs getting trained, then we can turn around and share what we’ve learned... s just incredibly powerful. Incredibly powerful. Code-Professional Development
Elementary Principal:
Teachers make decisions about what they want to focus on with their coach...s.

Code: Professional Development

Educational Specialist Gifted, Instructional Services Department, Elementary:
Of course you've seen the model with the circle. But it starts with the leadership...Co
de-Professional Development

Educational Specialist Gifted, Instructional Services Department, Elementary:
Or when you have a principal and the
Aspects of Academic Potential Project Model supported by research or other educational literature (Hinson & R. Harris, 2007 as referenced in Bland et al., 2013)

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<tr>
<th>Theme Descriptions</th>
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<tbody>
<tr>
<td>Relevant Literature</td>
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<td>Policy Issue</td>
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<tr>
<td>Level of Policy</td>
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<tr>
<td>Data Source</td>
</tr>
<tr>
<td>Data Collection</td>
</tr>
<tr>
<td>Method</td>
</tr>
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</table>

| VN810053 |
| Educational Specialist, Gifted, Instructional Services, Elementary |

Leadership at the school saying, “Yes, I’m going to send you...”
that the model is being implemented and used in the New England area. It's huge because you have that federal funding to support the closing achievement gap -- To support all students, basically.

*National Professional Organizations

Code-Javits grant

VN810054 Asst. Principal, Elementary: (Laughs) Well, considering the federal government only has—the federal government doesn’t even really have a true definition...

Code-Javits; Budget as Policy

VN810054 Asst Principal, Elementary: Well, I think the
Engagement of principals, other division staff and parents in decisionmaking

High ability students from historically disenfranchised communities often attend schools disproportionately impacted by negative outcomes of education policy actions that are described as based on research evidence (Nelson & Jones, 2007; Kozol, 1991; Kozol, 2006).

<table>
<thead>
<tr>
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<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pipeline Issues: Model’s content relate to later enrollment in higher-level courses and programs?</td>
<td>A disproportionate number of low-income students attend schools lacking enriching learning opportunities and academic rigor (Baker, Sciarra, &amp;...</td>
<td>*Identification *Differentiated Curriculum *Special Classes *Acceleration *Special Residential Schools *Technical Assistance *Program Evaluation *Magnet Schools</td>
<td>Local</td>
<td>*District Administrators *Teachers *Parent Advocates</td>
<td>*Interviews *Document Review</td>
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<tr>
<td>*Reason that is has survived is people are passionate about the reason why... Code- Prioritizing Principal Leadership</td>
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Farrie, 2010). In a study of North Carolina, Ohio, Maryland and Virginia school districts, W. G. Bowen, Chingos and McPherson (2009) found a high school’s academic level based on measures such as ACT/SAT- and AP course-taking patterns as the strongest predictor of bachelor’s degree attainment. Because their schools often focus on lower level instructional strategies and high stakes test preparation, too many low-income students lack opportunities to take courses with sufficient academic rigor for their talents. (Ford & Whiting, 2007).

A comparison of data from the Annual Report to the State of Virginia on Gifted Education in 2003 (just after the model was implemented) with data from 2014 (11 years later) shows a 565% increase in the number of Black and Hispanic students receiving gifted services in high school.
<table>
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<tr>
<th>Theme Descriptions</th>
<th>Relevant Literature</th>
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<th>Level of Policy</th>
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<th>Data Collection Method</th>
<th>Quotes</th>
</tr>
</thead>
</table>
| Equity versus Equality   | Many districts depend on local property taxes to fund their schools, resulting in a great deal of incongruity in the quality of public schools attended by children based on the circumstances of their neighborhoods. A disproportionate number of low-income students attend schools lacking enriching learning opportunities and academic rigor (B.D. Baker, Sciarra, & Farrie, 2010). | *School Budget/ funding policies | Local          | *District Administrators        | *Interviews            | Participant #4
|                          |                                                                                      |                               |                |                                 | *Document Review       | Frankly, I think we’ve done a lot with very little, and we’ve gotten used to working on a shoestring budget… |
| Professional Development | Research-based practices suggest consideration of the influences of home, prior knowledge, language, learning preferences, and culture as they plan learning experiences that build on strengths to compensate for weaknesses (Bernal, 2002; Castellano & Diaz, 2001; Donovan & Cross, 2002; Ford, J. J. Harris, Howard, & Tyson, 2000; Ford & | *Personnel Preparation         | State          | Teachers                         | *Interviews            | Participant #9
|                          |                                                                                      | *Legislation                  | Local          | District Administrators         | *Document Review       | We have a coaching model here …Our Gifted Education Resource Teacher is one of the teachers that is a coach. |
Teachers who receive professional development on culturally responsive teaching and learn strategies that nurture gifted potential in all populations gain a deeper understanding of the need to identify and build on academic strengths as they are manifested within the context of each student’s current life experiences (Borland, Schunur, & Wright, 2000; Gay, 2000).

So essentially, over 50% of her time, she’s coaching other teachers, and so what that allows is-- we had her start with some of the early adopters, the ones who wanted to try out some of the William and Mary units, Socratic seminar…
**Research Question 2:** What relationships or historical events, if any, did stakeholders perceive to be most influential on changes in policy and practice to the original gifted education mandate in Suburban District?

<table>
<thead>
<tr>
<th>Theme Descriptions</th>
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<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact: Stakeholder’s Perceptions</td>
<td>A result of NCLB was that funding to local school districts focused on the progress of students who do not meet minimum proficiency standards and the new law linked access to Title I funds to academic standards and assessment requirements (Tanner, 2013; Weiner, 2004). Underachieving students are well-researched and well-supported by NCLB. There was no incentive created by the law, however, for schools to collect data on advanced learners or seek to increase the number of students achieving at advanced levels (Beissner, 2008; Chudowsky, Chudowsky &amp; Kober, 2009; Cleaver, 2008; Duffett, Farkas, Loveless, 2008;</td>
<td>NCLB</td>
<td>Federal</td>
<td>District Administrators</td>
<td>*Interviews *Document Review</td>
<td>No Child Left Behind got people off track a little bit</td>
</tr>
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</table>
Mathews, 2009; VanTassel-Baska, & Stambaugh, 2007; Wyner, Bridgeland, & DiIulio, 2007).

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<th>Level of Policy</th>
<th>Data Source</th>
<th>Data Collection Method</th>
<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact: Stakeholder’s Perceptions</td>
<td>Though not without controversy, with <em>Race to the Top</em>, the Obama administration attempted to address social and linguistic inequities by using competitive grants to spur innovation and improvement in the lowest functioning schools. It is considered by some to be a shift from promoting equity to promoting excellence (Baker, Oluwole &amp; Green, 2013).</td>
<td>Race to the Top</td>
<td>Federal</td>
<td>District</td>
<td>Administrators</td>
<td>*Interviews</td>
</tr>
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<td></td>
<td>State</td>
<td></td>
<td></td>
<td>*Document Review</td>
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<td></td>
<td></td>
<td></td>
<td>Local</td>
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</table>
Appendix I

Codes

Policies
  Federal
    No mandate/definition
    Javits funding
  State
    Gifted mandate
    Multiple criteria
  District
    Focus on Services vs Identification
    Use of Data
      Response to Demographics
      Accountability vs Moral
    Obligation
      Title I – Priority Status
      As Tool for Program Advocacy
      As Tool for Program Development
    As Tool for Student Identification
  Model Philosophy in Action
    Closing the Opportunity Gap/
    Equal Access
    Continuum of Services
    Multiple Criteria
    Strengths-focused

  Rigorous Research-based Curriculum
    Attention to Transitions
    College and Career Readiness Goal
    Develop Cohort
    College Pipeline
  Budget as Policy
    District-level
    Secondary grant funding
    Attention to transitions
    School-level
    Buying Full-time Gifted
  Resource Teachers
    Professional Development
    Outreach to YS Parents
  Leadership Development
    Prioritizing School-level Leadership
    Provides Flexibility in Implementation
    Professional Development
    Teacher Professional Development
    Gifted Endorsement Requirement
    Academic Potential Course
    Cultural Competency
Gifted Resource Teachers Required
Training
    Gifted Resource Teachers Peer Coaching
Teachers, Counselors, Principals, other staff
    Grassroots
    Scaling
Gifted Program Coordinator’s Leadership
    Change Agent
    Developing Leaders
    Research-based
    Social Justice Leadership

Beyond AAP Benefits/ External to FCPS
Challenges
    Competing Priorities District
    Accountability vs Moral Obligation
    Mindset
    Community in general
    Parents of White, Affluent students
    Parents of Academic Potential students
    Students
    Teachers
Appendix J

Virginia Milestones in Public Education and Gifted Education

Table J8

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1618</td>
<td>College of Henricus, funded by a land grant and contributions authorized by James I of England, was chartered in Virginia was intended to educate both colonists and Native Americans.</td>
</tr>
<tr>
<td>1643; 1646; 1672</td>
<td>Apprenticeship laws were enacted which paralleled the apprenticeship and poor laws of England, attempted to provide some vocational, educational, and religious training for orphans, indigent children, and other minors without guardians.</td>
</tr>
<tr>
<td>1693</td>
<td>William and Mary was the second publicly funded school in Virginia, initially including a grammar school, a divinity school, the philosophy school, and the Indian School, founded for the education and Christianizing of Indian boys.</td>
</tr>
<tr>
<td>1779</td>
<td>Thomas Jefferson introduced in the legislature “Bill for the More General Diffusion of Knowledge.” The proposal called for a vertical state system of elementary schools, secondary schools, and colleges, crowned by a state university. All free children would be entitled to attend primary schools for at least three years without charge. More able boys would go on to secondary school at the public expense. Although he did receive approval for establishing the University of Virginia, he was never able to establish the public school system in Virginia.</td>
</tr>
<tr>
<td>1810</td>
<td>A state literacy fund was established to support the education of the indigent poor.</td>
</tr>
<tr>
<td>1846</td>
<td>The General Assembly provided for the establishment of a local school system under a county school superintendent, with commissioners from each district constituting a county school board.</td>
</tr>
<tr>
<td>1869</td>
<td>The Underwood Constitution established a free public school system for Virginia students from all races, but segregated schools were traditional in the state for the next century.</td>
</tr>
<tr>
<td>1903</td>
<td>An act established the minimum requirements for high school teachers, the first step in developing standards for high school accreditation.</td>
</tr>
<tr>
<td>1905</td>
<td>Dr. Joseph W. Southall, appointed state superintendent of public instruction in 1898 established “The May campaign,” a series of conferences aimed at improving public education in the South.</td>
</tr>
<tr>
<td>1912</td>
<td>The Southern Association of Colleges and Secondary Schools established a Virginia Commission on Accredited schools.</td>
</tr>
<tr>
<td>1915</td>
<td>The Department of Public Instruction issued a new course of study for high schools consisting mainly of college preparatory work, but also included subjects in business, agriculture, and homemaking. Aided by</td>
</tr>
<tr>
<td>Year</td>
<td>Event</td>
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<td>------</td>
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</tr>
<tr>
<td>1916</td>
<td>The General Assembly established professional standards for school division superintendents.</td>
</tr>
<tr>
<td>1917</td>
<td>Establishment of requirements for a standard four-year high school, including organization, teaching staff, and a program of studies.</td>
</tr>
<tr>
<td>1918</td>
<td>Department of Education replaced that of Department of Public Instruction</td>
</tr>
<tr>
<td>1922</td>
<td>The General Assembly enacted the county unit law and a statewide compulsory attendance law.</td>
</tr>
<tr>
<td>1931-1941</td>
<td>Focus was on curriculum revision.</td>
</tr>
<tr>
<td>1941</td>
<td>Virginia experiences a teacher shortage due to WWII.</td>
</tr>
<tr>
<td>1947</td>
<td>Virginia establishes a scholarship fund for undergraduates preparing to teach</td>
</tr>
<tr>
<td>1950</td>
<td>$7,000,000 given by Virginia to localities to begin construction to accommodate rapidly growing student populations.</td>
</tr>
<tr>
<td>1956</td>
<td>U.S. Senator Harry Byrd, Sr. called for what has become known as Massive Resistance, a group of laws passed intended to prevent integration. The law cut state funds and closed any public school that attempted to integrate.</td>
</tr>
<tr>
<td>1957</td>
<td>Russians launch Sputnik raising concerns that led to the enacting of legislation providing for a commission to evaluate the curriculum, teacher training and certification. The commission recommended improving the quality of teaching and strengthening programs in science, mathematics, foreign languages, and English, while at the same time recommending a balanced curriculum.</td>
</tr>
<tr>
<td>1958</td>
<td>Two of the key proposals approved by the legislature were repeal of the state compulsory attendance law in favor of a local option statute, and a tuition grant program to make state funds available for parents of children attending private nonsectarian schools or public schools in localities other than those in which they normally would be enrolled.</td>
</tr>
<tr>
<td>1958</td>
<td>White high schools were closed in Norfolk, Front Royal, Charlottesville, and Prince Edward County following federal court orders to desegregate. All of these schools reopened during 1958, except those in Prince Edward County which remained closed until the fall of 1964.</td>
</tr>
<tr>
<td>1959</td>
<td>A few courageous African American students integrated schools that had been closed.</td>
</tr>
<tr>
<td>Year</td>
<td>Event</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td>1964</td>
<td>Title VI of the Civil Rights Act, which was enacted by Congress in 1964, provides that no person in the United States shall, on the ground of race, color, or national origin, be excluded from participating in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance. The state Board of Education and all school divisions in Virginia executed compliance documents in order to receive federal funds available for various educational programs.</td>
</tr>
<tr>
<td>1968</td>
<td>The Virginia Board of Education approved kindergarten as a part of public schools with established standards including teacher certification and an approved curriculum guide.</td>
</tr>
<tr>
<td>1970</td>
<td>Virginia Board of Education established standards to raise the quality of education for all Virginia students in an effort to address the varying quality of education based on location in the Commonwealth.</td>
</tr>
<tr>
<td>1973</td>
<td>The first summer residential Governor's Schools were held in 1973 at Mary Baldwin College, Mary Washington College, and the Science Museum in Richmond.</td>
</tr>
<tr>
<td>1977</td>
<td>Virginia Association for the Gifted was founded in 1977 to support gifted education.</td>
</tr>
<tr>
<td>1982</td>
<td>The Virginia Advisory Committee for the Education of the Gifted was formally established by the Virginia Board of Education to provide guidance to the Board and the Superintendent of Public Instruction about the educational needs of students identified as gifted in school.</td>
</tr>
<tr>
<td>1983</td>
<td>The Department of Education developed the Standards of Learning program, which included objectives to help students acquire the knowledge, skills, and attitudes needed for further education and employment.</td>
</tr>
<tr>
<td>1985</td>
<td>Virginia opens first for academic year Governor’s schools.</td>
</tr>
<tr>
<td>1986</td>
<td>Virginia adopts regulations governing educational services for gifted students.</td>
</tr>
<tr>
<td>2002</td>
<td>Standards of Accreditation were established indicating that starting with the class of 2002, students need to pass six of the 11 high school tests to graduate, but schools where less than 70 percent of students pass the tests could face the loss of accreditation starting in 2007.</td>
</tr>
</tbody>
</table>

### Appendix K

**Timeline: Milestones in Gifted Education Programming in the Suburban District**

Table K9

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1964</td>
<td>Suburban District opens first center for students with high academic potential indicated by a score of 140 or above on individual intelligence tests such as Stanford-Binet Intelligence Scale or the Wechsler Intelligence Scale for Children (From District Archives)</td>
</tr>
<tr>
<td>1974</td>
<td>School-based Gifted and Talented Program was established at early elementary school for students in grades 3-6 scoring 120 – 139 on CogAT, Otis Lennon or other group administered ability tests.</td>
</tr>
<tr>
<td>1986</td>
<td>A school district committee assigned to study issue of underrepresentation submits published report regarding the underrepresentation of African-American and Latino students identified for participation in the Gifted and Talented Center and in the School-based programs using the then-current test-based screening process which was not normed for underrepresented populations.</td>
</tr>
<tr>
<td>1988</td>
<td>1988 Annual Report to the State confirmed underrepresentation of African-American and Latino students in grades 3-6 in Gifted and Talented program</td>
</tr>
<tr>
<td>1989</td>
<td>Appointment of Gifted Center Identification Committee to study identification procedures and recommend changes that could lead to increase in African-American and Latino students in district’s Gifted &amp; Talented program.</td>
</tr>
<tr>
<td>1991</td>
<td>The GT Center Identification Committee submits preliminary report recommending changes to GT identification process including replacing the one score from CogAT and Otis-Lennon criteria and adding other criteria such as a student rating on a Gifted Behavior Rating Scale, student progress reports, and achievement test scores.</td>
</tr>
<tr>
<td>1993</td>
<td>Introduction of multiple criteria for selection and Levels of Service ending 30 year process (1963 – 1993) of identification based on single test score of 140 or above.</td>
</tr>
<tr>
<td>Year</td>
<td>Event Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1999</td>
<td>Due to increase in Asian students participating in the GT Center Program from 6.5% in June 1988 to 16.8% in June 1999 and in the school-based program from 8.8% in June 1988 to 14% in June 1999, Asian students were no longer one of the targeted underrepresented student populations. African-American and Latino students continued to be underrepresented.</td>
</tr>
<tr>
<td>1999-2001</td>
<td>Task force of principals and teachers from schools with high levels of students from populations underrepresented in the GT program were charged with rethinking identification and delivery of gifted services to students. The resulting model was the birth of the Academic Potential Project, a strength-based model with the goal of access, advocacy, and affirmation by focusing on early identification, differentiated instruction using academically rigorous research-based curriculum, critical and creative thinking lessons, and a basic change in the delivery of school-based gifted services from a once a week pull-out model to a collaborative model.</td>
</tr>
<tr>
<td>2003-2004</td>
<td>Inaugural Academic Potential Project class implemented in one Title I elementary school in the district during the summer.</td>
</tr>
<tr>
<td>2007</td>
<td>Regulation 3335 adds gifted education endorsement requirement for teachers of students receiving gifted services.</td>
</tr>
<tr>
<td>2007</td>
<td>Gifted and Talented program name change to reflect instructional focus on science, language arts, social studies and mathematics.</td>
</tr>
<tr>
<td>2011</td>
<td>Suburban District and professional development company partner to offer this extensive multimedia resource center and an online graduate level course comprised of four modules that enable schools to adapt the Academic Potential Project model to meet the needs of traditionally underrepresented populations in their own district.</td>
</tr>
<tr>
<td>2011-2012</td>
<td>Implemented a program titled “Twice-exceptional Learners” to recognize the unique needs of special education students who also have the ability to think, reason, and problem-solve at very high levels. Instructional services has collaborated with office of special education instruction to present numerous parent and teacher workshops on twice exceptional students. The division has developed and funds an online graduate level course called Undererved Populations of Gifted to help teachers understand the importance of serving these learners (see <a href="https://www.fcps.edu/node/33071">https://www.fcps.edu/node/33071</a>).</td>
</tr>
</tbody>
</table>
The Academic Potential Project was recognized in the National Association for Gifted Children’s 2012 publication: Unlocking Emergent Talent: Supporting High Achievement of Low-Income, High Ability Students as a successful program that supports low-income, high-ability learners.

There are 84 schools actively implementing the Academic Potential Project model however, there are Academic Potential Project in every school and the Gifted education Resource Teachers at the elementary level and the school counselors at the secondary level advocate for their participation in gifted education classes across the district.

Significant events impacting the policy and practice of gifted education in the Suburban District
### Appendix L

#### Table L10

Data Matrix

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>1950</strong> National Science Foundation Act formed National Science Foundation and provided funding for research and support of math and science education.</td>
<td><strong>1950</strong> $7,000,000 given by Virginia to localities to begin construction to accommodate rapidly growing student populations.</td>
<td>1950</td>
<td>U.S. Senator Harry Byrd, Sr. called for what has become known as Massive Resistance, a group of laws passed intended to prevent integration. The law cut state funds and closed any public school that attempted to integrate.</td>
</tr>
<tr>
<td>Year</td>
<td>Event</td>
<td>Location</td>
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</tr>
<tr>
<td>1958</td>
<td>Following the Soviet Union's launching of the first satellite (Sputnik) in 1957, Congress declared an educational emergency and enacted the National Defense Education Act (P.L. 85-864), which allocated funds to develop potential for talent in math, science, and foreign languages.</td>
<td>White high schools were closed in Norfolk, Front Royal, Charlottesville, and Prince Edward County following federal court orders to desegregate. All of these schools reopened during 1958, except those in Prince Edward County which remained closed until the fall of 1964.</td>
<td></td>
</tr>
<tr>
<td>1964</td>
<td>Prince Edward County remained closed until the fall of 1964.</td>
<td>Suburban District opens first center for students with high academic potential indicated by a score of 140 or above on individual intelligence tests such as Stanford-Binet Intelligence Scale or the Wechsler Intelligence Scale for Children (From District Archives).</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>Event</td>
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<td>------</td>
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</tr>
<tr>
<td>1965</td>
<td>The Elementary and Secondary Education Act (P.L. 89-10) passed in Congress; Titles III and V related to the development of model gifted programs and the hiring of state-level gifted education personnel.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1968</td>
<td>President Johnson established a White House Task Force on the Gifted and Talented; the formal report was never published, but a 50-state survey was completed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1968</td>
<td>The Virginia Board of Education approved kindergarten as a part of public schools with established standards including teacher certification and an approved curriculum guide.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1969</td>
<td>Federal bills were introduced in both houses of Congress that would have established a federal definition, provided support</td>
<td></td>
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</tr>
</tbody>
</table>
to states to expand programs, and directed the U.S. Commissioner of Education to conduct a study on the needs of the gifted.

1970 Federal bills introduced in 1969 were included a section 806 of the Elementary and Secondary Educational Amendments of 1969 (P.L. 91-230), which mandated a report to Congress on the status of and need for programs for the gifted.

1970 Virginia Board of Education established standards to raise the quality of education for all Virginia students in an effort to address the varying quality of education based on location in the Commonwealth.

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
<th>Year</th>
<th>Event</th>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1973-1974</td>
<td>Several federal bills introduced in both houses of the 93rd Congress resulted in the establishment of an Office of Gifted and Talented in the U.S. Office of Education, annual appropriations for the office, grants for training, research and demonstration projects, grants to state and local agencies, and the establishment of a national clearinghouse related to gifted.</td>
<td>1973</td>
<td>The first summer residential Governor’s School were held in Virginia serving 400 students at Mary Washington College and the Science Museum in Richmond</td>
<td>1974</td>
<td>School-based Gifted and Talented Program was established at early elementary school for students in grades 3-6 scoring 120 – 139 on CogAT, Otis Lennon or other group administered ability tests.</td>
</tr>
<tr>
<td>1975</td>
<td>Only $2.5 million was appropriated for federal efforts; funding remained at this level for several years.</td>
<td>1977</td>
<td>Virginia Association for the Gifted was founded</td>
<td>1977-1978</td>
<td>Federal bills supporting the education of the gifted and talented and a federal definition of gifted and talented students.</td>
</tr>
</tbody>
</table>
talented were again introduced in both houses of Congress. The proposed Gifted and Talented Children's Education Act (P.L. 95-561) passed as Title IX-A of the Education Amendments of 1978.


1981 Congress provided $5.6 million in fiscal year 1981. The consolidation and improvement provisions of the Omnibus Budget Reconciliation Act of 1981 consolidated 20 programs into a Chapter 2 block grant for state and local educational agencies; funding decreased 42% for programs.
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982-83</td>
<td>The National Commission on Excellence was established; hearings were</td>
<td>1982</td>
<td>The Virginia Advisory Committee for the Education of the Gifted was</td>
</tr>
<tr>
<td></td>
<td>held around the country on six aspects of public education including</td>
<td></td>
<td>formally established by the Virginia Board of Education to provide</td>
</tr>
<tr>
<td></td>
<td>gifted education; the National Business Consortium was established to</td>
<td></td>
<td>guidance to the Board and the Superintendent for Public Instruction</td>
</tr>
<tr>
<td></td>
<td>put business and education into a partnership for the promotion of</td>
<td></td>
<td>about the needs of students identified as gifted in schools.</td>
</tr>
<tr>
<td></td>
<td>education of the gifted.</td>
<td></td>
<td>The Department of Education developed the Standards of Learning</td>
</tr>
<tr>
<td></td>
<td>The report of the National Commission on Excellence in Education,</td>
<td>1983</td>
<td>program, which included objectives to help students acquire the</td>
</tr>
<tr>
<td></td>
<td>titled A Nation at Risk: The Imperative for Education Reform, was</td>
<td></td>
<td>knowledge, skills, and attitudes needed for further education and</td>
</tr>
<tr>
<td></td>
<td>published; education of the gifted was mentioned in several sections.</td>
<td></td>
<td>employment.</td>
</tr>
<tr>
<td>1983</td>
<td>In the 98th Congress, the Senate established a caucus on children</td>
<td>1983</td>
<td></td>
</tr>
<tr>
<td></td>
<td>that</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
explored (among other issues) the impact of federal budget cuts on highly talented children, especially special populations.

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>Virginia opens four academic year Governor’s schools.</td>
<td>1986</td>
<td>Virginia adopts regulations governing educational services for gifted students.</td>
</tr>
<tr>
<td>1986</td>
<td>A school district committee assigned to study issue of underrepresentation submits published report regarding the underrepresentation of African-American and Latino students identified for participation in the Gifted and Talented Center and in the School-based programs using the then-current test-based screening process which was not normed for underrepresented populations.</td>
<td>1988</td>
<td>1988 Annual Report to the State confirmed underrepresentation of African-American and Latino students in grades 3-6 in Gifted and Talented program.</td>
</tr>
<tr>
<td>1987-1988</td>
<td>Both houses of Congress overwhelmingly passed virtually identical bills regarding education of the gifted. The</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Senate passed House Omnibus Bill, S. 373. The House bill was also included in the House Omnibus Bill, H.R. 5. Funding of $7.9 million was appropriated for the reestablishment of a Federal Office of Gifted and Talented, for grants for training and demonstration projects, for grants to state and local agencies, and for the establishment of a National Research Center.

1988

The Javits Gifted and Talented Students Act of 1988. Passed as part of ESEA, this is the only federal program dedicated to the development of gifted and talent. Funds do not fund local programs but are intended to carry out a coordinated
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1989</td>
<td>Appointment of Gifted Center Identification Committee to study identification procedures and recommend changes that could lead to increase in African-American and Latino students in district’s Gifted &amp; Talented program.</td>
</tr>
<tr>
<td>1991</td>
<td>The GT Center Identification Committee submits preliminary report recommending changes to GT identification process including replacing the one score from CogAT and Otis-Lennon criteria and adding other criteria such as a student rating on a Gifted Behavior Rating Scale, student progress reports, and achievement test scores.</td>
</tr>
<tr>
<td>1993</td>
<td>Introduction of multiple criteria for selection and Levels of Service ending 30 year</td>
</tr>
</tbody>
</table>
of identification based on single test score of 140 or above.

1999

Due to increase in Asian students participating in the GT Center Program from 6.5% in June 1988 to 16.8% in June 1999 and in the school-based program from 8.8% in June 1988 to 14% in June 1999, Asian students were no longer one of the targeted underrepresented student populations. African-American and Latino students continued to be underrepresented.

1999-2000

Informal task force of principals and teachers from schools with high levels of students from populations underrepresented in the GT program were charged with rethinking identification and delivery of gifted services to students. The Resulting model was the birth of the Academic Potential Project, a strength-based model with the goal of access, advocacy, and
affirmation by focusing on early identification, with the creation of the Gifted Behaviors Rating Scale, differentiated instruction using academically rigorous research-based curriculum, critical and creative thinking lessons, and a basic change in the delivery of school-based gifted services from a once a week pull-out model to a collaborative model.

2001

No Child Left Behind revision of the Elementary and Secondary Education Act of 1965 (ESEA) passed. The focus on proficiency for all thought to be demonstrable through high stakes testing was thought to harm gifted students’ development.

2002

Standards of Accreditation determined by student results on high stakes tests established for Virginia.
2003-2004  Inaugural Academic Potential Project class implemented in one Title I elementary school in the district during the summer.

March 3, 2003
Primary Q2

Minutes
Opened 6 new centers

November 7, 2005
Q1 Q2
Primary March 2006
Primary Q2

Minutes
GT program growth 6% - 12%

March 2006
Primary Q2

First Interim Evaluation Report

2006  American Competitiveness Initiative focuses on research and development in STEM disciplines representing a sustained investment of approximately $137 billion in investment—the largest since the Apollo Space program in the 1960s.

2007  *Gifted and Talented program name change to reflect instructional focus on science, language arts, social studies and mathematics.

*Regulation 3335 adds gifted education endorsement requirement for teachers of students receiving gifted services.

Sept. 10, 2007 Supt Memo

Program Name Change Continued Level IV in Centers And school-based


Addressed concerns raised in previous evaluation
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>Race to the Top. Federal stimulus funding to school districts that included college and career readiness as requirement for states to receive funding.</td>
</tr>
<tr>
<td>2010</td>
<td>Quality Counts identifies Virginia as 4th best public school system in the country</td>
</tr>
<tr>
<td>2011</td>
<td>Suburban District and Professional development company partner to offer this extensive multimedia</td>
</tr>
<tr>
<td>2010-2011</td>
<td>Programs and Initiatives Tied to Closing the Gap in Suburban District</td>
</tr>
<tr>
<td>2009-2010</td>
<td>Plans and Programs Tied to Closing the Minority Student Achievement Gap in Suburban District</td>
</tr>
<tr>
<td>Q1</td>
<td>Primary</td>
</tr>
<tr>
<td>June 8, 2009</td>
<td>Minutes Sally Reis, PhD guest presenter</td>
</tr>
<tr>
<td>Q2</td>
<td>Primary</td>
</tr>
<tr>
<td>July 13, 2009</td>
<td>Minutes Work session K-HS services</td>
</tr>
<tr>
<td>Q1</td>
<td>Primary</td>
</tr>
<tr>
<td>Oct 2009</td>
<td>School Board Presentation</td>
</tr>
<tr>
<td>Q1</td>
<td>Primary</td>
</tr>
<tr>
<td>Nov 2010</td>
<td>Closing the Minority Student Achievement Gap in Suburban District: Plan Scope and Resourcing Definition</td>
</tr>
<tr>
<td>2010-2011</td>
<td>Primary Q1</td>
</tr>
</tbody>
</table>
resource center and an online graduate level course comprised of four modules that enable schools to adapt the Academic Potential Project model to meet the needs of traditionally underrepresented populations in their own district.

March 8, 2011
Primary Q1
Closing the Minority Student Achievement Gap in Suburban District: Plan Scope and Resourcing Definition

2011-2012
Implemented a program titled “Twice-exceptional Learners” to recognize the unique needs of special education students who also have the ability to think, reason, and problem-solve at very high levels. Instructional services has collaborated with office of special education instruction to present numerous parent and teacher workshops on twice exceptional students. The division has

2011-2012
Primary Q1
Programs and Initiatives Tied to Closing the Gap in Suburban District
developed and funds an online graduate level course called *Underserved Populations of Gifted* to help teachers understand the importance of serving these learners (see https://www.fcps.edu/node/33071).

2012

The Academic Potential Project was recognized in the National Association for Gifted Children’s 2012 publication: *Unlocking Emergent Talent: Supporting High Achievement of Low-Income, High Ability Students* as a successful program that supports low-income, high-ability learners.

March 12, 2012

Secondary Q1

USDOE Office for Civil Rights: Civil Rights Data Collection

April 16, 2012

Primary Q1

Minutes Work Session Continuum of Services

September 25, 2012

Primary Q1

USDOE OCR Letter Complaint

January 14, 2013

Primary Q1

Minutes Work Session – Discussion 3 new gifted centers

February 11, 2013

Minutes Work Session - Board identified key issues
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 28, 2013</td>
<td>Minutes Work Session - Discussed staff presentation of proposed changes to the scope of the analysis of the Suburban District continuum of Gifted Education Services;</td>
</tr>
<tr>
<td>April 2013</td>
<td>Programs and Initiatives Tied to Closing the Gap in Suburban District</td>
</tr>
<tr>
<td>June 2013</td>
<td>Review of the Gifted Education Programs - Report for the Gifted Education Programs Program Review</td>
</tr>
<tr>
<td>June 27, 2013</td>
<td>Discussion of Review by local university staff</td>
</tr>
<tr>
<td>July 15, 2013</td>
<td>Review of the Gifted Education Program Suburban District Public Schools</td>
</tr>
<tr>
<td>Sept. 11, 2013</td>
<td>Academic Potential Project summer camp video</td>
</tr>
<tr>
<td>Dec. 11, 2013</td>
<td>Voluntary Resolution Agreement</td>
</tr>
<tr>
<td>Primary Q2</td>
<td>Suburban District Voluntary Resolution Agreement</td>
</tr>
</tbody>
</table>
The data matrix was created as part of the document review, documents were compared to interview transcript data. This allowed opportunities to ascertain areas of convergence or divergence in the participants’ perceptions of their experiences in working with the Suburban District’s Academic Potential Project.
VITA
Darlene Wiggins Dockery

2017 Doctor of Philosophy- Educational Policy, Planning and Leadership – Gifted Education
Cognate – Teaching English to Speakers of Other Languages
College of William & Mary
Williamsburg, VA

1999 Masters of Education – Educational Entrepreneurship
Regent University
Virginia Beach Virginia

1986 Bachelor of Arts- Public Policy Studies
Duke University
Durham, NC