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A Qualitative Study Toward Understanding Educators' Perceptions of a Talent Development Program Designed to Address the Underrepresentation of Historically Marginalized Students in Advanced Programming in a Large Virginia School Division

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A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Education at Virginia Commonwealth University

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Abstract

A QUALITATIVE STUDY TOWARD UNDERSTANDING EDUCATOR'S PERCEPTIONS OF A TALENT DEVELOPMENT PROGRAM DESIGNED TO ADDRESS THE UNDERREPRESENTATION OF HISTORICALLY MARGINALIZED STUDENTS IN ADVANED PROGRAMMING IN A LARGE VIRGINIA SCHOOL DIVISION

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A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Education at Virginia Commonwealth University

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This study extends the limited, existing research on Sunnydale Public School's (SPS's) SOAR program. For clarity, SOAR is a talent development (TD) program that aims to not only enhance students' reasoning and problem-solving abilities but also to remedy the racial/ethnic disproportionality of SPS's gifted and talented program. More specifically, I used interpretive, qualitative methods for this investigation to understand participants' perceptions of SOAR, in hopes of adding to the talent development knowledge base and informing SOAR policy and practice. Ultimately, participant views converged on several topics (i.e. racial and ethnic disproportionality, brain malleability, multiple intelligences, etc.) and diverged on others (i.e.

SOAR's value). Taking interview and focus group data, SPS documents, past researchers' findings, my own experiences, and existing literature into account, I arrived at and offer several commendations and recommendations that might benefit SPS's SOAR program and might be considered alongside other research by districts of similar contexts looking to adopt or improve a TD program.

Chapter One: Introduction

According to Renzulli (2012), Gifted and Talented (G&T) education supports high-ability students in achieving self-actualization while simultaneously producing problem-solvers and knowledge generators. Historically, there have been vast inequities in G&T education with White and Asian students being overrepresented as compared to their Black and Hispanic counterparts (OCRDC, 2016). More specifically, in schools that offer G&T programs and/or classes, Whites and Asians are collectively overrepresented by fifteen percentage points while Blacks and Latinos are underrepresented by a combined fourteen percentage points (OCRDC, 2014). Further, G&T programs accept Black and Latino students at a rate of less than fifty-percent (Callahan, 2005),[1] and according to Ford and King (2014), about 250,000 Black G&T students across the United States go unidentified each year. Historical research on the racist and classist genealogy of G&T education has led some to claim that, whether intentional or not, these programs often maintain a social caste system in schools (Mansfield, 2016, 2015), and that G&T education is a means of de facto segregation (Ford & King, 2014; Mansfield, 2016, 2015). Regardless of the intent, or lack thereof, failure to include certain groups of students in G&T education can result in harmful consequences. For instance, non-inclusion affects individuals' intellectual and sociocultural development, perpetuates American classism, and could impede the future life course of underrepresented students (Ford & King, 2014; Mansfield, 2016, 2015). It is

[1] Ford and King (2014), applying the Relative Difference in Composite Index (RDCI), 100% - Composition (%) of Black students in G&T education/Composition (%) of Black students, to data collected in 2006, 2009, ad 2011 approximated that Black students were underrepresented in G&T programs by approximately 50%.

for these and similar reasons that persistent and prevailing racial and ethnic disparities in G&T education are concerning (Callahan, 2005; Elhoweris, Mutua, Alsheikh, & Holloway, 2005; Ford & King, 2014; Ford, Moore, Whiting & Grantham, 2008; Mansfield, 2016; OCRDC, 2016; Peters & Engerrand, 2016; Worrell, 2014 via Plucker & Callahan 2014), especially when considering the vast amount of literature on G&T education (Elhoweris et al., 2005; Worrell, 2014 via Plucker & Callahan, 2014), the limited attention this research has paid to marginalized groups since 1924 (Elhoweris et al., 2005), and the demographic shifts that are now underway in America (Elhoweris et al., 2005; Ford et al., 2008; Siek & Sterling, 2012).[2] Based on these understandings, I reason that failure to acknowledge, nurture, and develop the gifts and talents of those who have been historically underrepresented in G&T education might hold negative implications for the future of the United States (U.S.) in addition to individual students (Peters & Engerrand, 2016).

Statement of Purpose

The purpose of this study was to build from the initial findings of Fellinger, Hawthorne, and Venable's (2017-a) quasi-experimental research on Sunnydale Public School's (SPS's) (pseudonym) SOAR Program while also contributing to the existing talent development (TD) and G&T education knowledgebases.[3] Generally speaking, the goals of Fellinger et al.'s (2017-a) research included two major components: First, to determine the impact of SOAR on student growth. Second, to determine the impact of SOAR on teachers' perceptions of potential

[2] By 2040, minorities are expected to account for a majority of the U.S. population (Elhoweris et al., 2005; Ford et al., 2008; Siek & Sterling, 2012) and according to Siek and Sterling (2012), minorities accounted for the lion's share of children under the age of one in 2011.

[3] For clarity, the intent of the current inquiry was not to investigate cultural factors contributing to or denying students access to G&T programs.

giftedness in historically underrepresented populations. The specific research questions that guided their study were:

1. Do the second-grade students in SOAR classrooms demonstrate an increase in reasoning and problem-solving abilities after participating in SOAR?

2. Are students in SOAR classrooms demonstrating higher levels of reasoning and problem-solving abilities than their peers in non-SOAR classrooms?

3. Does participation in the SOAR program impact teachers' perceptions of potential giftedness in historically underrepresented populations when compared to non-participating teachers?

4. Does teacher participation in the SOAR program impact the number of gifted referrals and/or eligibility of historically underrepresented populations when compared to non-participating teachers?

5. Are schools that participate in the SOAR program showing a greater increase in the number of fourth-grade students identified for accelerated math when compared to fourth-graders in non-SOAR schools?

Fellinger et al.'s (2017-a) study was limited by the number of teacher responses to their survey. Thus, the question *Does participation in the SOAR program impact teachers' perceptions of potential giftedness in historically underrepresented populations when compared to non-participating teachers?* remained unanswered. A representative of SPS shared that Fellinger et al.'s (2017-a) study might have experienced a low participant response rate due to the timing of distributing their survey in relation to when SPS administered its SOAR training. Thus, the current study aimed to fill that gap by conducting a combination of online, telephone, and face-to-face interviews and focus groups. In addition, recruitment was expanded to teachers both within and beyond second-grade. This study also extended Fellinger and colleagues (2017-a) work by using a qualitative approach which gave rich explanations that added to the previous study's quantitative findings (Merriam & Tisdell, 2016). In addition to learning more about teachers' perceptions, participants included building-level administrators (BLAs) and G&T

department staff members in hopes that these varied perspectives would contribute a more comprehensive view on perceptions of SOAR.

Bearing in mind that the current study is qualitative and emergent (McMillan, 2012; Merriam & Tisdell, 2016), I began my investigation using the following research questions:

1. How do stakeholders (teachers, BLAs, and G&T department members) define:
   a. intelligence,
   b. ability,
   c. creativity,
   d. talent, and
   e. giftedness?

2. How do stakeholders (teachers, BLAs, and G&T department members) respond when asked about G&T and SOAR PD opportunities?

3. What are stakeholders' (teachers, BLAs, and G&T department members) perceptions of:
   a. the purposes of the G&T program?
   b. the effectiveness of the G&T program?
   c. the value of the G&T program?

4. How do stakeholders (teachers, BLAs, and G&T department members) respond to district trends showing overrepresentation/underrepresentation of students in G&T programs according to social identities such as race/ethnicity and socioeconomic status?

5. What are stakeholders' (teachers, BLAs, and G&T department members) perceptions of:
   a. the purposes of the SOAR?
   b. the effectiveness of the SOAR?
   c. the value of the SOAR?

6. How do stakeholders (teachers, BLAs, and G&T department members) respond to the emerging evidence that:
   a. students in SOAR classrooms are demonstrating higher levels of reasoning and problem-solving abilities than their peers in non-SOAR classrooms?
   b. student participation in the SOAR increases the number of gifted referrals when compared to non-participating students but does not necessarily result in an increase in program eligibility of historically underrepresented populations?

I used semi-structured interviews and focus groups to gather data for these questions since a semi-structured approach allows for flexibility not only about what is asked but also how

it is asked (Merriam & Tisdell, 2016). I offer more detailed methodological explanations in the "Summary of Methods" section of this chapter and in Chapter Three.

Positionality

In my fifteen years as an educator, I have served as an elementary, middle, and high school art teacher and as a ninth-grade assistant principal. As a teacher, I taught general courses, gifted and advanced level courses, and I interviewed and adjudicated students for one district's G&T program. As an administrator, I oversaw six instructional departments to include Career and Technical Education, English, fine arts, health and physical education, history, and special education. An additional administrative responsibility of mine included serving on gifted advisory committees and helping to determine if students should be accepted into or continue in the district's G&T program based on their CogAT data, Slocumb-Payne scores, classroom performance, and work samples.

In addition to my career experience with G&T education, I am the parent of a second-grader who participates in his school's Science, Technology, Engineering, and Math (STEM) talent development program (TDP) and who is slated to take the CogAT and undergo G&T evaluation in 2019.

Beyond my personal and professional experiences, I am a proponent for social justice who subscribes to Dweck's (2012) belief that the brain is malleable and trusts that everyone's talents should be nurtured so that they can achieve self-actualization. To these points, I am interested in TDPs because I see them as a way of providing equitable access to those who might otherwise be experiencing opportunity/knowledge gaps (Peters & Engerrand, 2016). I also view them as a means to enhance the racial and ethnic proportionality of G&T programs. To the latter, I accept that racially and ethnically diverse programs enhance students' social,

psychological, and academic outcomes, increase their likelihood of attending college, and give them access to broader social networks (Dawkins & Braddock III, 1994; TCF, 2016; Wells, Fox, & Cordova-Cobo, 2016). Furthermore, I believe that integrated programs increase the likelihood that participants will live among, work with, and form cross-racial friendships as adults (Reynolds, Thernstrom, Braceras, Kirsanow, Melendez, & Taylor, 2006; TCF, 2016; Wells, Fox, & Cordova-Cobo, 2016).

Lastly, as a former, and hopefully future, school administrator, I am interested in understanding the pros and cons of SOAR in hopes that I will discover talent development (TD) policies and practices that I can consider as a school leader. As a parent, I hope that the information gleaned from this investigation will be insightful as my son continues in his school's TDP and potentially G&T program. I also hope my understandings will contribute to new or revised policies and practices that might assist in enhancing the racial and ethnic proportionality of G&T programs not only in SPS but also in school districts with similar contexts and might inform leadership preparation programs.

Summary of Methods

I used interpretive qualitative methods for this investigation "to provide rich narrative descriptions of phenomena that enhance understanding" (McMillan, 2012, p. 18) and to "[understand] how people interpret their experiences, how they construct their worlds, and what meaning they attribute to their experiences" in relation to my own experiences (Merriam & Tisdell, 2016, p. 6). More specifically, I collected data from teachers, BLAs, and G&T staff members through online, over-the-phone, and face-to-face interviews and focus groups. I also gathered data through document analyses (Merriam & Tisdell, 2016) and Fellinger et al.'s (2017-a) study. Together, these information sources allowed me to triangulate my data to enhance the

credibility of my findings. As I collected my data, I carefully reviewed and open-coded it. I later reduced my codes to several thematic categories to include racial and ethnic disproportionality, brain malleability, multiple intelligences, PD, and benefits and values. Finally, I developed my understandings in light of participants' perceptions, the documents analyzed, Fellinger and Colleague's findings, my personal and professional experiences, and existing literature, all of which led me to commendations of and recommendations for the SOAR program which are presented in Chapter Five.

Context

In the following subsections, I outline the federal, state, and local G&T policy contexts and describe SPS's context. In the first three subsections, one should see that the included federal, state, and SPS's regulations and policies share a common thread which is to improve the representativeness of historically marginalized students in G&T programs. In the last subsection (*SPS's Context*) I situate SPS in the state of Virginia, discuss the size of the district in terms of physical buildings and student population, offer information on student demographics, and confirm that racial and ethnic disproportionality exists in SPS's G&T program.

Federal Policy Context

The U.S. federal government's support for G&T education has fluctuated according to the levels of political attention toward emphasizing excellence and/or equity over the years, with excellence typically being favored during times of crises (Brown, 2008; Mandelman, Tan, Aljughaiman, Grigorenko, 2010; Plucker & Callahan, 2014; Ward, 2005). Some post-*Brown v. Board* examples of these variations include: The launch of Sputnik (Excellence) in 1957 (Brown, 2008; Mandelman et al., 2010; Plucker & Callahan, 2014; Ward, 2005); President Johnson's Great Society (Equity), the Civil Rights movement (Equity), and the passage of the Elementary

and Secondary Education Act (Excellence) in the 1960s (Brown, 2008; Ward, 2005); President Nixon's signing of the Gifted and Talented Children's Education Assistance Act (Excellence) (Ward, 2005), the Marland Report (Excellence) (Brown, 2008), and Congress' passing amendments to the ESEA (Excellence) in the 1970s (Ward, 2005); the passing of the Educational Consolidation Act (Equity) (Brown, 2008; Ward, 2005), the release of "A Nation at Risk" (Excellence) (Brown, 2008), and the passing of the Javits Act (Equality and Excellence) in the 1980s; the passage of NCLB (Equity) in 2001 (Brown 2008; Ward, 2005); President Obama's defunding of the Javits Act, as part of the federal budget in 2012 (Equity) (Stephens, 2011); the restoration of Javits funding in 2014 (Excellence) (NAGC, 2014), and the passing of the TALENT Act as part of the Every Student Succeeds Act (ESSA) in 2015 (Excellence) (NAGC, n.d.).

Succinctly, the federal government's support for gifted education has been inconsistent at best, and when compared to the Individuals with Disabilities Education Act (IDEA), which "guarantees all children between the ages of three and twenty-one with specifically identified disabilities a 'free appropriate public education' in the least restrictive environment in conformance with an Individualized Education Program" (Ward, 2005, p. 58), federal structures for gifted education are severely lacking (Brown, 2008; Ward, 2005). Nevertheless, the TALENT Act (2015) gives hope for gifted education as it promotes PD to support high-ability students, seeks to recognize and respond to excellence gaps, makes student achievement data publicly available, and advocates for research that supports best practices in gifted education (NAGC, n.d.). Likewise, the Javits Act continues to give hope to those who have been historically underrepresented in gifted education through the first of its two priorities, which is to support "Initiatives [that] develop and scale up models serving students who are

underrepresented in G&T programs" (USDOE, 2017). The Javits Act also supports G&T through national research and, as funding permits, money to educate elementary and secondary G&T students; however, "as with other grant programs, Congress must provide funding for the Javits program each year" (NAGC, n.d., p. 2).

In addition to the Javits and TALENT acts, the Every Student Succeeds Act (ESSA), otherwise known as the 2015 revision of the 1965 Elementary and Secondary Education Act (ESEA), provided new G&T education guidelines "that address data collection and reporting, use of PD funds, use of Title I funds, and computer adaptive assessments" (NAGC, n.d., p. 1). More specifically, ESSA requires states to report G&T achievement data on state report cards, and, regardless of achievement level, to specify on Title II applications how they will use PD funds to improve administrators' and teachers' capacity in terms of G&T identification and instruction. Relatedly, districts must handle their G&T students' data in a manner consistent with their state and must ensure that Title II PD offerings benefit all students, including G&T students.

State Policy Context

In 2012, Virginia's Board of Education revised its *Regulations Governing Educational Services for Gifted Students* (VDOE, 2012-a). This document, originally adopted in 2010 (VDOE, 2012-b), applies "to all local school divisions in the commonwealth" (VDOE, 2012-a) and provides a range of information under the headings of Applicability; Definitions; Screening; Referral, Identification, and Service; Parental Rights for Notification, Consent, and Appeal; Local Plan, Local Advisory Committee, and Annual Report and Funding. In short, it states that Virginia's school divisions must establish uniform G&T education procedures which include consistent screening, referral, and identification and placement processes. More specifically, it states that referrals can come from self-reference, parents, teachers, peers, or others; that

identification and placement committees should consist of various district level employees or "others with credentials or experience in gifted education," and that identification and placement committees should consider three or more criteria for eligibility, determine referred students' eligibility, and decide on eligible students' placement. The decrees also state that divisions must use a nationally-normed aptitude test as one of the three measures for eligibility under the categories of general intellectual aptitude or specific academic aptitude where they must use a performance-based assessment as one of the measures when determining eligibility in the arts or career or technical fields. Regardless of the type of gift, districts are to give fair considerations for all students and must tell parents about the identification and placement committee's decision within ninety days. Afterwards, parents of ineligible students have ten days to appeal the decision and parents of eligible students may appeal future changes in identification, placement, or removal from the program. If parents appeal the initial eligibility, then the district must assemble a mostly new identification and placement committee that will reconsider the available data and make a new determination.

The state's regulations also require districts to locally develop gifted comprehensive plans that outline the divisions' philosophy, goals and objectives, identification placement, consent, and notification procedures (VDOE, 2012-a). These comprehensive plans must address the "equitable representation of students" and must include descriptions of how the "testing and assessment materials have been evaluated by the developers for cultural, racial, and linguistic biases."

Lastly, the regulations state that schools are to provide service options to gifted or potentially gifted students in the areas of general intellectual aptitude, specific academic aptitude, or more than one academic aptitude from grades kindergarten through twelve (VDOE, 2012-a);

although, when it comes to students who have a propensity for the arts or in career and technical fields, divisions are afforded discretion in addressing their needs.

Sunnydale's Policy Context

Based on the contents of Sunnydale Public Schools' (SPS's) "Gifted" webpages, its *2017-22 Plan for the Education of the Gifted*, and its *2017-18 Gifted Education Services Brochure*, SPS's Gifted and Talented (G&T) policies and procedures appear consistent with Virginia's G&T regulations. For instance, the philosophy of SPS's G&T program is "to identify diverse learners and provide a comprehensive program" that administers differentiated and challenging instruction as well as socioemotional support to cultivate students' knowledge and maximize their potential through a range of service options that promote student-centered learning. Regarding identification, SPS provides all of its school-based gifted (SBG) coordinators "cultural sensitivity training that promotes awareness of and sensitivity to cultural factors that influence the referral and assessment of potential[ly] gifted students." SPS also identifies its G&T students' specific academic aptitudes through multiple criteria that include "nationally-normed aptitude and achievement tests, teacher recommendations, and grades or student products (kindergarten only)." Academically, SPS identifies its students for G&T in English and math in elementary schools; identifies students for all four core subject areas starting in fifth-grade; allows eighth-grade students to apply to attend the district's specialty centers or to attend one of the nearby regional governor's schools; allows students in grades three through eight to apply to the division's center-based gifted (CBG[4]) program, and allows students in grades four through eleven to apply for various enrichment programs that take place outside of

[4] SPS's CBGs are reportedly more rigorous and challenging than the gifted services received in SPS's non-CBG schools. Students accepted to the CBG program are assigned to CBG schools based on their home address, and their continuation in the CBG program is contingent on students' academic performance.

the school, mostly during summers and weekends. SPS also tracks high-ability kindergarten through eighth-grade students, regardless of school type (CBG or not), into classes with their gifted identified peers and provides differentiated instruction to them through enrichment and extension, increased rigor, and faster pacing.

Sunnydale's Context

As described by Fellinger et al. (2017-a), SPS is a "suburban public-school division" (p. 12) that is heavily populated; is located in central Virginia, and is "one of the largest public-school systems on the east coast" (p. 12). According to the district's website, SPS houses sixty-five schools (thirty-eight elementary, thirteen middle, and fourteen high schools), sixteen of which are "Specialty Centers" that provide focused instruction in areas such as the arts, technology, language, math and science, international baccalaureate, and career and technical education, to name a few. The Office of Civil Rights Data Collection (OCRDC, 2017) 2013 survey data revealed that in 2013, the district was home to 57,135 PK-12 students, housed sixty G&T programs and offered AP courses in ten schools.[5] At that time, the racial and ethnic breakdown of SPS's students, excluding groups that accounted for less than 1% of the overall student population, were as follows: White (54.8%), Black (25.8%), Hispanic (11.5%), Asian (3.5%), and Two or More races (4%). According to the same survey's results, SPS's 2013 G&T program's racial/ethnic demographics were: White (78%), Black (7%), Hispanic (4%), Asian (6%), and students of Two or More Races (5%). When comparing SPS's G&T enrollment to its overall student enrollment using the Relative Difference in Composite Index (RDCI), a one-to-one comparison where G&T enrollment should theoretically mirror the district's overall student enrollment by subgroup, it becomes clear that racial and ethnic disproportionality exists in SPS's

[5] Fellinger et al. (2017-a), reported similar demographic data in their capstone; therefore, these figures remain relevant.

G&T program (Fellinger et al., 2017-a; Ford & King, 2014). Figure 1 illustrates the disproportionality of SPS's 2013 G&T program using OCRDC's 2013 (2017) survey results as determined by the RDCI.

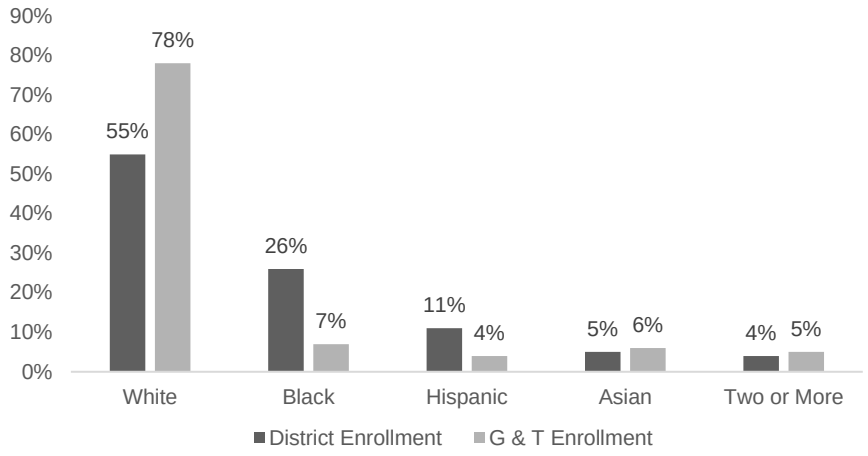

Figure 1. SPS's 2013 District v. G&T Student Enrollment as determined by the RDCI.

As shown in Figure 1, based on the RDCI, Whites, Asians, and students of Two or More races were overrepresented in SPS's G&T program in 2013 by twenty-three, one, and one percentage point respectively. Alternately, Black and Hispanic students were underrepresented in the district's G&T program by nineteen and seven percentage points at that time.

Further, the results of a risk ratio calculation (.051/.1820 = .280) using SPS's 2015 OCRDC (2017) survey data (presented in Table 1) indicate that SPS's majority students are 28% more likely to enter SPS's G&T program than their minority counterparts (Lamorte, 2018).

Table 1

Risk Ratio Comparing SPS's Minority v. Majority Students' Access to G&T Education

Race/Ethnicity	G&T	Not G&T	Total	Cumulative Incidence
Minority	1,389	27,128	28,517	1,389/27,128 = .051
Majority	4,757	26,136	30,893	4,757/26,136 = .1820

Separating Asian students, who are historically overrepresented in G&T and who are overrepresented in SPS's G&T program based on the RDCI, from the minority group and adding them to the White category using SPS's OCRDC 2015 survey data (shown in Table 2), the G&T access disparity grows from 28% to 33% (.051/.156 = .326)

Table 2

Risk Ratio Comparing SPS's White/Asian v. Other Subgroups' Access to G&T Education

Race/Ethnicity	G&T	Not G&T	Total	Cumulative Incidence
Other Groups	1,389	27,128	28,517	1,389/27,128 = .051
White/Asian	5,144	27,769	32,913	5,144/32,913 = .156

In other words, SPS's White and Asian students combined have a 33% greater chance of being accepted into the district's G&T program than students belonging to the remaining minority groups.

Seeing as the risk ratio calculations in Tables 1 and 2 are based on slightly older data, they seem to confirm that racial and ethnic disproportionality is a continued issue in SPS's G&T program.

Purposes and Goals of Sunnydale's SOAR Program

In their study, Fellinger et al. (2017-a) provided insights on the purpose and goals of SPS's G&T program as gleaned from a central office administrator and a G&T instructional specialist. Accordingly, Fellinger and colleagues (2017-a) found that the short, medium and long-term goals of SOAR include changing teacher's perceptions of underserved students, identifying giftedness more accurately, and enhancing the representativeness of all student populations in SPS's G&T program. More specifically, in the short-term, SPS aims to increase higher-level thinking skills by placing an intense focus on "critical and creative reasoning skills" (Fellinger et al., 2017-a, p. 15) in all subject areas to enhance "auditory, memory, and listening,

problem-solving and logic, high-level questioning, divergent thinking, and higher-level vocabulary" (p. 15) skills. In the mid-term, SPS seeks to improve teacher-family relationships before, during, and after the G&T identification process. The purpose of this goal is to keep families abreast of G&T development opportunities, their students' progress, and to improve teachers' cultural sensitivity through ongoing two-way communication. In the long-term, SPS hopes to build a common understanding of language and activities assessed by the CogAT in order to more accurately identify giftedness in students from a variety of backgrounds, and to put students on par with one another so their teachers can monitor, adjust, and align their instruction to meet their "students' individual needs and capabilities" (p. 16). In short, SPS's overarching belief is that through SOAR's short, medium, and long-term goals, it will be able to improve the racial/ethnic representativeness of its G&T program.

Summary

In sum, this study sought to build on the work of Fellinger et al. (2017-a) by using qualitative methods and by expanding the research sample to include online, over-the-phone, and face-to-face interviews and focus groups with teachers, BLAs, and G&T staff members; to add to the TD and G&T theoretical knowledgebases, particularly as a vehicle to enhance racial and ethnic proportionality of related programs, and to provide participant and researcher insights that, when considered in light of other research, might position all students to achieve self-actualization thereby better preparing them for life in a majority-minority America. Assuming a qualitative approach and utilizing a wider-variety of research participants, to include more than one grade level, sites, and job titles, added texture to Fellinger et al.'s (2017-a) work by not only providing explanations that enhance their numeric findings but also giving a more comprehensive view on how SPS's employees perceive SOAR. Understandings from this

investigation might benefit SPS's Office of Research if/when the district seeks to scale up SOAR to additional sites. Lastly, the understandings gleaned from this study led to commendations on and recommendations for SOAR's policies in procedures and tentative findings might also be considered; although not exclusively, by other districts that are seeking to enhance the representativeness of their G&T programs by through similar programs (Callahan, 2005).

Chapter Two: Literature Review

In *Reason and Rigor*, Ravitch & Riggan (2017) discussed differing perspectives of dissertation literature reviews. They wrote that some academics view the dissertation literature review as a "rite of passage" that is both "arduous and time-consuming" and that, at least in part, qualifies "doctoral work [as] rigorous" (p.28); that some scholars view it as a way for *novice* researchers to pay tribute to established researchers' work in hopes that one day, the attention will be reciprocated, and that some researchers believe it should help students find gaps in their field's existing knowledge base and be used to situate their work within the larger context. Ravitch & Riggan (2017) recommend that literature reviews either provide a "comprehensive synthesis of all the research literature on a specific topic" (p. 29) or be "confined to those works that are most relevant to the study at hand" (p. 29).

The literature review contained within this chapter assumes the more restrictive approach to avoid simply rehashing the literature presented in Fellinger et al.'s (2017-a) study. I also use this literature review to give an overview of Gifted & Talented (G&T) education as it is historically conceived; to highlight potential barriers and recommended solutions to these barriers; to feature the apparent shift from the Gifted Child Paradigm (GCP) to the Talent Development Paradigm (TDP) (Dai, 2015); to consider some commonalities that exist among different TD theories and/or models, and to highlight and discuss Fellinger et al.'s (2017-a) findings.

With these goals in mind, I began retrieving articles from the Virginia Commonwealth University (VCU) Libraries website (https://www.library.vcu.edu/) by searching the following

terms and phrases: *giftedness*, *gifted education,* and *history of gifted education*. Initial results of these searches produced approximately two-hundred and eighty-thousand "Full Text Online" sources. Filtering these results to "Peer-Reviewed Only" reduced this number, but only marginally. Therefore, I further refined my search to include peer-reviewed articles on *gifted education* and *giftedness* from *2005 to the present* only. After reviewing some of the gifted education and giftedness articles, I revisited the VCU Libraries website (2017) and searched for *talent development* (*TD) + gifted* since both terms appeared in the literature I read. Again, I received a mass of results and opted to include peer-reviewed articles from *2010-present* only. After filtering the search results, I sorted them by *popularity* to secure the most well-known research on the topic of *TD*.

Any sources referenced in this study that do not fit the aforementioned parameters include articles and texts that I have used in past courses, a text and articles that committee members recommended, copies of Fellinger et al.'s (2017-a) study and executive summary which I received from my dissertation chair, and what I call the *Wikipedia effect*. The Wikipedia effect refers to when I located new sources in the works reviewed; similar to how one clicks on links within a Wikipedia web page to go to a new page to learn more about the contents of the first page.

Below, I start by providing some historical context. Next, I share identified barriers to G&T education. Then, I offer literature-based solutions and focus on the TDP as a way to improve the racial and ethnic proportionality in G&T education. Afterwards, I discuss some theories and models that underpin the TDP; I present and critique Fellinger et al.'s (2017-a) methods, findings, commendations, and recommendations, and I conclude with a summary of this chapter.

Historical Context

Giftedness has been conceived differently from one society to the next (Robins, 2010). Different societal definitions exist because giftedness is a culturally loaded concept that is socially constructed and responds to the needs and values of a society at a given time (Gyarmathy & Senior, 2016; Renzulli, 1978 via Ayers & Seward, 2016; Robins, 2010; Subotnik, Olszewski-Kubilius, & Worrell, 2011). Some examples of how giftedness represents what is important in a society become clear when considering the Spartans, Athenians, and Romans given that the Spartans valued military skills, the Athenians physical fitness, and the Romans engineering (Colangelo & Davis, 2003; Gallagher & Weiss, 1979 via Robins, 2010). More recently, giftedness has seemingly become synonymous with intelligence and has led to what Dai (2015) calls the Gifted Child Paradigm (GCP).

Gifted Child Paradigm

The traditional view of giftedness, or the GCP, is referred to by Gyarmathy and Senior (2016) as "mechanistic" (p. 5) and is the canonical view of giftedness that stems from early studies of intelligence (Dai, 2017). More specifically, this paradigm has roots in Galton's (1892) *Hereditary Genius* (Plucker & Callahan, 2014), and Hollingworth's (1926) and Terman's (1921) studies of IQ (Mansfield, 2016; Plucker & Callahan, 2014; Robins, 2010; Subotnik et al., 2011), and is thereby influenced by the eugenics movement (Kluger, 2004; Mansfield, 2016). As indicated by the descriptions of the latter studies, intellect has been heavily emphasized in the field, and as a result, giftedness has often been conflated with unidimensional intelligence (Gottfredson, 1997; Gyarmathy & senior, 2016; Herrnstein & Murray, 1994 via Dai, 2015; Jarvin & Subotnik, 2015; Mandelman et al., 2010; McBee, 2006; Plucker & Callahan, 2014; Subotnik, Stoeger, & Olszewski-Kubilius, 2017) even though researchers (i.e. Gardner and Sternberg) acknowledge that giftedness can manifest in various ways across multiple

dimensions. Despite theories such as Gardner's (1983) *Multiple Intelligences* (MI) and Sternberg's (1977) *Triarchic Theory*, and researchers' (i.e. Ford & King, 2014; Mansfield, 2016, Peters & Engerrand, 2016) critiques of the longstanding psychometric approach for determining giftedness, the unitary model of Gifted and Talented (G&T) education persists and relies heavily on IQ and aptitude tests which serve as the primary gatekeepers of G&T education (Subotnik et al., 2017; Subotnik et al., 2011). Some researchers (i.e. Dai, 2017; Ford & Grantham, 2003; Gyarmathy & Senior, 2016; Mansfield, 2016; Ward, 2005) argue that ability tracking based on IQs or other test scores is faulty, exclusionary, leads to segregation, and lacks predictive validity (Subotnik et al., 2017) while others view the process as objective, believe that the presence of cut scores serve a political purpose in silencing influential stakeholders whose children are ineligible for G&T programming (Subotnik et al., 2017), and feel that unique, separate G&T environments are warranted since general education environments are not rigorous enough to serve G&T students (Referencing early NRCGT findings via Plucker & Callahan, 2014).

Emphasis on Intelligence

The relationship between G&T education and intelligence dates back to 1884 when G&T education became an academic field (Gallagher, 1994; Tannenbaum, 1983 via Robins, 2010). Eight years later, Galton published *Hereditary Genius* (1892) which many recognize as the first study on human ability. As indicated by the title, Galton used *Hereditary Genius* to argue that "Heredity is the determining factor in intelligence" (Gallagher, 1994; Robins, 2010, p. 3; Tennenbaum, 1983 via Robins, 2010). Many researchers have since either confirmed or debunked Galton's position (or recognize various degrees of interplay between the innate and the contextual). Below, I give a succinct history that includes some prominent researchers and how they advanced hereditarian beliefs, particularly in education.

Spearman's *g*

In 1904, Spearman pioneered factor analysis and established the *g* factor which stands for general intelligence. Spearman believed that *g* "could be expressed as a single number and used to rank people on a unilinear scale of intellectual worth" (Gould, 1981, p. 251). Gould credited Burt, Spearman's successor at University College, for politicizing Spearman's *g* and using it to justify hereditarian theory. Britain later adopted and used Spearman's *g* to funnel students into certain tracks, or courses of study, in schools. Another researcher named Thurstone argued that intelligence was multifaceted and claimed that Spearman and Burt's methods were flawed by saying that (In Gould's words) "Factor analysis is a brutally empirical technique, used when a discipline has no firmly established principles, but only a mass of crude data and hope that patterns of correlation might provide suggestions for further and more fruitful lines of inquiry" that "factor analysis as a primary method is flawed" and that "British hereditarians promoted an innatist interpretation of dominant *g* nonetheless, and thereby blunted the hopes of millions" (p. 316).

Binet-Simon and Intelligence Testing

In 1905, Binet, Henri, and Simon's methodological efforts led to the Binet-Simon Scale which they designed to assess people for mental retardation (Gould, 1981; Sattler, 2001 via Robins, 2010). Since its inception, there have been three iterations of the Binet-Simon; however, the 1908 version is the one that "established the criterion used in measuring the so-called IQ" (Gould, 1981, p. 149). More specifically, in 1908 Binet assigned age levels to Binet-Simon tasks and children would progress through each one until they could no longer do so. Once a child reached his or her stopping point, his or her mental age became known. After determining a child's mental age, Binet suggested subtracting it from his or her chronological age to arrive at

his or her general intellectual level; however, in 1912, Stern argued that rather than subtracting a child's mental age from his (or her) chronological age to divide it instead claiming that the relative difference between the ages, not the absolute difference, is what is important. Gould wrote that this shift in calculating the general intellectual level is when "the intelligence quotient, or IQ, was born" (p. 150). Gould also wrote that Binet expressed concern over reducing something as complex as intelligence to a single number, feared that school leaders would use IQ to justify ridding schools of certain children or to implement tracking, and opposed the idea of ranking people by IQ.

Several years after the development of the Binet-Simon, an American named Goddard translated the scale from French to English. Then, in 1916, a professor at Stanford University named Terman (Mansfield, 2016; Robins, 2010), revised it to what we now know as the Stanford-Binet (Sattler, 2001 via Robins, 2010). In time, the Stanford-Binet was normed to the overall population, which at the time was predominantly White and middle-class (Callahan, 2005; Elhoweris et al., 2005; Ford & Grantham, 2003; Ford & King, 2014; Ford et al., 2008; Mansfield, 2016; Peters & Engerrand, 2016). Norming the Stanford-Binet made it applicable to a larger audience since each score could now be compared with those of the general population (Lagemann, 2000 via Robins, 2010).

During World War I (WWI), Terman, along with a group of psychologists (to include Yerkes and Goddard), used intelligence testing to help the military differentiate and sort army recruits (Gould, 1981; Lagemann, 2000 via Robins, 2010; Mansfield, 2016). Extending intelligence testing to the military made these tests "relevant to the masses" (Robins, 2010, p. 4). Later, Brigham, secretary of the College Entrance Examination Board, used the army model as a basis for the Scholastic Aptitude Test (Gould,1981). In 1923, Brigham published *A Study of*

American Intelligence which Gould claimed appealed to propagandists and "became a primary vehicle for translating the army results on group differences into social action" (p. 224). Gould wrote that Brigham eventually realized that the army data was a poor measure of innate intelligence due to the test's cultural biases and flawed data-analysis methods; however, by the time he had his epiphany, people had already been subjected to his previous claims. Gould alleged that in spite of the issues with the army test's methodology, the test still produced data that showed strong correlations between scores and environment which could have led to social reform but did not since people continued to accept excuses like Terman's "good orphanages preclude any environmental cause of low IQ" (p. 222) which instead preserved hereditarian beliefs.

Following WWI, America experienced an influx of immigrants and American schools, similar to the army, began using intelligence tests to sort students into different educational and career tracks based on their perceived ability (Gould, 1981; Mansfield, 2016; Robins, 2010). This process, known as tracking, is one of four ways in which G&T students have traditionally received services in American education. Other ways schools provide G&T services are through regular classroom accommodations, part-time assignment to G&T classes, and acceleration by subject or grade (NAGC, n.d.). Some researchers (i.e. Ford & Grantham, 2003; Mandelman et al., 2010; Mansfield, 2016; Ward, 2005) assert that overreliance on biased tests and their corresponding data to determine giftedness and the use of tracking have marginalized certain minority groups and have led to claims that G&T education is elitist.

Hereditarianism

While claims that people have inborn qualities that have earmarked them for certain positions in life dates back to the days of Socrates and Plato (Gould, 1981), such assertions have

lacked "scientific" merit up until the last century. For about one-hundred and twenty-five years, researchers have used eugenic, or hereditarian studies, to measure racial and ethnic qualities (Gould, 1981; Mandelman et al., 2010; Mansfield, 2016). Well-known examples of eugenics research include Hopkins (Kluger, 2004) and Burt, Broca, and Morton's (Ford & Grantham, 2003) craniometry. For clarity, craniometric studies involved measuring skulls, or the cranial capacity, of people from different races and ethnicities to establish a hierarchy based on perceived intelligence among different groups of people. Needless to say, this research was methodologically flawed, not extensively replicated (so flaws went unnoticed and uncorrected), and used to solidify the notion that Caucasians, who were in power, were intellectually and culturally elite (Gould, 1981; Kluger, 2004). Media outlets contributed to the latter as they "endlessly copied [researchers' conclusions] from secondary source to secondary source" (Gould, 1981, p. 82) thereby propelling them into the mainstream and leading the public to accept them as truth.

Further, Gould (1981) identified two fallacies of hereditarian research and used them as arguments *In the Mismeasure of Man*. The first fallacy involves reducing complex, abstract concepts to simple and tangible things and the second is ranking "complex variation as a gradual ascending thing" (p. 24). Craniometry and intelligence testing are guilty of both. To this point, Gould wrote that "What craniometry was for the nineteenth century, intelligence testing has become for the twentieth, when it assumes that intelligence is a single, innate, heritable, and measurable thing" (p. 25).

Barriers to Gifted and Talented Education

As problematized in Chapter One, racial and ethnic disproportionality in G&T education is a long-standing and concerning (Elhoweris et al., 2005; Ford et al., 2008; Siek & Sterling,

2012). Underrepresentation is especially troubling "not only for [G&T education's] political and advocacy reasons but also because students from these subgroups represent the fastest growing segments of the K-12 population, and many of their talents are going overlooked and underdeveloped" (Peters and Engerrand, 2016, p. 159). Recently, researchers have explored numerous barriers that have led to racial and ethnic marginalization in G&T education. One of the most frequently discussed obstacles is the overreliance on IQ and achievement testing to determine G&T eligibility (Ford & King, 2014; Peters & Engerrand, 2016). Scholars frequently argue that these tests are biased since they were normed to the White middle-class (Callahan, 2005; Elhoweris et al., 2005; Ford & Grantham, 2003; Ford & King, 2014; Ford et al., 2008; Mansfield, 2016; Peters & Engerrand, 2016), that they are used in ways other than intended (Mansfield, 2016),[6] and that they present language barriers for certain populations (Peters & Engerrand, 2016).

Other obstacles to G&T education that are frequently referenced in the literature include: cultural values that deviate from the mainstream (Ford et al., 2008); weak curricular expectations due to factors such as deficit thinking (Ford & King, 2014); teachers who are not adequately trained to teach or identify giftedness in other cultures (Callahan, 2005; Elhoweris et al., 2005); implicit biases (Elhoweris et al., 2005; Ford et al., 2008; Mandelman et al., 2010); students' limited access to opportunity (Ford & King, 2014; Mandelman et al., 2010; Peters and Engerrand, 2016; Schmidt, Burroughs, Zoido, & Houang, 2015 via Subotnik et al., 2017; Vopat, 2011); the field's limited theoretical development (Renzulli, 2012); No Child Left Behind (NCLB) (Ward, 2005);[7] no overarching purpose (Peters & Engerrand, 2016) or definition of

[6] The Binet-Simon Scale was used to determine differences between races and ethnicities (Mansfield, 2016).
[7] Schools have opted not to refer G&T students to off-site programs for the sake of boosting test scores (Ward, 2005).

giftedness (Carman, 2013; Ford & King, 2014; Mansfield, 2016; NAGC, 2016); negative peer pressures that lead to underachievement (Ford et al., 2008); socioeconomic status (SES) (Mansfield, 2016; Peters & Engerrand, 2016; Ward, 2005); teacher disproportionality (Elhoweris et al., 2005), and tracking (Mandelman et al.,2010; Mansfield, 2016; Ward, 2005).

While all the barriers listed above are concerning, perhaps the most troubling are the lack of a unified definition and purpose *of and for* G&T education as *a unanimous* purpose and definition should theoretically underpin the decisions and policies that guide professional practice (Renzulli, 2012) and therefore might have a bearing on some of the other impediments to G&T education. Conceivably, the lack of consensus surrounding G&T's purpose and definition might be related to G&T researchers' limited attention towards theory development (Renzulli, 2012). Renzulli (2012) noted that the G&T field is "notably thin" (p. 158) in this area and proposed that "If we are not guided by a unified theory when choosing [opportunity and service] options we are likely to fall for anything! Theory is, indeed, the rudder and compass that should guide us toward practices that avoid randomness in the goals we pursue" (p. 150). Renzulli also warned that theory alone is not enough and argued that theory should not only be research-based but also should be easy to interpret and flexible to enhance practical application (Ambrose, Cohen, Tannenbaum, 2003; Ambrose, VanTassel-Baska, Coleman, & Cross, 2010; Cohen, 1988; Renzulli, 2011 via Renzulli, 2012). Similar to Renzulli's argument, in the sense of flexibility, Ayers and Seward (2016) wrote that they purposefully avoided defining giftedness when developing their Place Based Investment Model (PBIM) because doing so might exclude students and all students "are equally deserving of opportunities to develop their talents" (p. 313). On the contrary, Gyarmathy and Senior (2016) define the mechanistic approach to G&T education as a three-step process which involves defining, identifying, and developing gifts;

therefore, not having a definition is a problem under the GCP since one-third of the automated method is missing.

Purpose of Gifted and Talented Education

The purpose of G&T education has been a point of contention within the field for quite some time (Peters & Engerrand, 2016). Searches for *Purpose* and *Purpose of Gifted Education* on the National Association for Gifted Children (NAGC) website failed to produce a single, clear goal statement; however, some authors have attempted to present such statements in their work. For example, Peters and Engerrand (2016) took a broad approach and suggested that people can assume that the aim of G&T education is to promote excellence amongst those who live atop the ability spectrum; Mandelman et al. (2010) wrote that the goals of G&T education are threefold: to benefit society, to help G&T people achieve happiness through development and self-actualization, and to enhance humanity; similar to Mandelman et al. (2010), Renzulli (2012), mentioned promoting self-actualization, referenced high-ability students, and asserted that additional purposes of G&T education are to yield new generations of problem solvers and knowledge producers by emphasizing creativity over rule-following, and Subotnik et al. (2011 via Ayers & Seward, 2016 and Dai, 2010) echoed the notions that G&T education should prioritize creativity and extraordinary performance. While these examples highlight only a few purpose statements extracted from the literature, they demonstrate some of the similarities and differences that exist when researchers attempt to conceptualize the intent of G&T education. They also reinforce that there is a lack of consensus surrounding the goals of G&T education (Peters and Engerrand, 2016).

Definitions of Giftedness

As mentioned under the *Barriers to Gift Education* heading, there is not a universally accepted definition of giftedness (Carman, 2013; Ford & King, 2014; Mansfield, 2016; NAGC, 2016); although, several attempts to establish one have been made. Since 1970, there have been six federally accepted definitions of giftedness. These were adopted in 1970, 1972, 1978, 1988, 1993, and 2001 (Ford & King, 2014). Of these definitions, the version provided in the Marland Report (1972), which identifies the six dimensions of giftedness as general aptitude, specific aptitude, creativity, leadership, the arts, and psychomotor ability, is the most commonly accepted definition (Mandelman et al., 2010; Plucker & Callahan, 2014).[8] However, while the Marland Report (1972) definition is widely accepted, it is vague, lacks cultural and environmental considerations, and fails to consider how culture and environment affect giftedness (Mandelman et al., 2010; Plucker & Callahan, 2014). To these points, Ford and King (2014) have praised the 1978 and 1993 definitions, claiming that they are the most equitable of the six federal definitions since they recognize how race and SES might limit opportunity access and thereby prevent members of certain groups from G&T program entry. Ford and King (2014) also praised the 1993 rendition since it considers a child's experiences and environments as part of the nomination and adjudication processes. Further, Ford and Grantham (2003) noted that this version referenced both *potential* and *TD* and acknowledged that giftedness transcends sociodemographic groups.

Recently, the NAGC (2016) posted (on its website) that "nearly every state has its own definition of G&T students. Some define giftedness based on a comparison to same-aged peers. Others base the definition on needs beyond those provided in the regular classroom. Not all

[8] Virginia's current definition is based on the Marland (1972) definition (VDOE, 2012-a)

states require that school districts follow the state definition." In 2009, the NAGC reviewed states' definitions of giftedness (Ford & King, 2014). Based on its analysis, the association found that the terms and phrases *Intellectual, Creativity, Visual and Performing Arts, Academics, Specific Academics, Leadership, Cultural Diversity, and Underachieving* appeared in states' definitions thirty-four, twenty-six, twenty-six, twenty-three, thirty-one, seventeen, ten, and five times respectively. These findings also support the claim that giftedness is not defined consistently across states (Peters and Engerrand, 2016). Because "not all states require that school districts follow the state definition" (NAGC, 2016), even when a state-wide definition of giftedness exists - the definition might not be accepted or applied consistently throughout the state. Varying definitions across localities is problematic because, in theory, a district could find a child as gifted under one definition, the child could move to another district, and the child could not qualify for G&T services in the receiving district if the new district operates under a different definition than the sending district did (Carman, 2013). Theoretically, similar scenarios might exist across states as well. Therefore, "The failure to conclusively define giftedness continues to inhibit individual school systems from adequately identifying all potential[ly] gifted and talented students" (Fellinger et al., 2017-a, p. 57)

Literature-Based Solutions to Underrepresentation in Gifted and Talented Education

Researchers recommend that people view giftedness as dynamic, not static (Callahan, 2005) and recognize that it is not innate (Vopat, 2011) but instead the result of access to opportunity (Ford & King, 2014; Mandelman et al., 2010; Peters & Engerrand, 2016; Schmidt, Burroughs, Zoido, & Houang, 2015 via Subotnik et al., 2017; Vopat, 2011;); provide ongoing professional development to staff members that addresses the different ways in which giftedness manifests across cultures (Callahan, 2005) and implicit bias training so staff members can

become aware of their own biases so that they can control for them (Ford & King, 2014); provide ongoing professional development for staff members on multiculturalism and promote the use of multicultural instruction (Ford et al., 2008); take steps to identify and rectify biased, restrictive policies (i.e. Tracking) while avoiding quotas (Mandelman et al., 2010; Mansfield, 2016; Ward 2005) but considering thresholds (i.e. twenty-percent equity allowance[9]) and programmatic diversity goals (Ford & King, 2014; Siegel-Hawley & Frankenberg, 2013); utilize talent development (TD) programs such as enrichment clusters and the Parallel Curriculum Model (Callahan, 2005); assess giftedness early and try to identify and nurture it often, when present, to mitigate excellence gaps (Callahan, 2005); provide high-quality preschool to level the playing field and to limit excellence gaps (Peters & Engerrand, 2016); work to develop gifted assessments, to include authentic and curriculum-based assessments (Callahan, 2005), that are both reliable and valid (Mandelman et al., 2010), and once developed, use them (Callahan, 2005); use existing assessment instruments, but norm them locally so that they are more sensitive to the local population (Peters & Engerrand, 2016); employ non-verbal assessments (i.e. the Cognitive Abilities Test – Nonverbal Subscale (CogAT-NV) and the Naglieri Nonverbal Abilities Test (NNAT)) (McBee, 2006); although, some (i.e. Giessman, Gambrell, Stebbins, 2013 via Plucker & Callahan, 2014) question the effectiveness of such assessments; utilize a variety of nomination avenues as there appears to be a lack of consensus among researchers (i.e. Mandelman et al., 2010; McBee, 2006; Miller, 2012) as to which nomination sources are best, and recognize and provide academic, motivational, counseling, and language supports as needed (Callahan, 2005).

[9] The twenty-percent threshold, according to Ford and King (2014) eliminates underrepresentation due to chance and indicates that policies, practices, and/or people might be discriminatory.

The Talent Development Paradigm

TD has appeared in the literature for approximately seventy years (Dai, 2011; Dai & Chen, 2013; Subotnik et al., 2011 via Dai, 2017). In the 1980s, researchers began favoring TD over gifted identification while seeking to recognize and advance a wider variety of abilities (a la Gardner's MI) through diverse programming and services (Olszewski-Kubilius & Thomson, 2015). Recently, TD has gained momentum due to research findings that support brain malleability (Dweck, 2012; Ericsson, Nandagopal, & Roring, 2005 via Olszewski-Kubilius & Thomson, 2015; Subotnik et al., 2011; Suzuki & Aronson, 2005 via Gyarmathy & Senior, 2016); a concept that bolsters the mindset that giftedness is dynamic, not static (Dai & Sternberg, 2004 via Dai, 2017; Olszewski-Kubilius & Thomson, 2015; Subotnik et al., 2011). Resultingly, Dai (2015) argues for a shift from the GCP to the TDP. The TDP is a pluralistic alternative to the GCP (Dai, 2015) based on the assumptions that everyone has talents that can manifest, plateau, and fade at various points of development; that can be identified through both formal and informal processes (Subotnik et al., 2011 via Ayers & Seward, 2016), and that can be addressed through varied strategies that respond to individual needs while considering and fostering motivation, ability, and environment (Gyarmathy & Senior, 2016). Additionally, researchers assert that TD should include a network of support and enrichment opportunities that exist both within and beyond physical school buildings (Subotnik & Olszewski-Kubilius, 1997 via Ayers & Seward, 2016) to help students achieve a level of competence and mastery that might serve as their groundwork for career success or creative production when they become adults (Subotnik et al., 2011 via Olszewski-Kubilius & Thomson, 2015). SPS uses SOAR or TD to prepare second-grade students for the CogAT test to improve their chances of being accepted into SPS's G&T or fourth grade accelerated math programs.

Theories and Models Underpinning Talent Development

Renzulli's Enrichment Triad Model (ETM) is one of four models that seemingly underpin TD in the U.S. and abroad (Subotnik et al., 2011). The three other models include Gagne's (2005 via Subotnik et al., 2011) Developmental Model of Giftedness and Talent (DMGT), Stanley's (1976, 1985 via Subotnik et al., 2011; Pfeiffer, Assouline, & Lupkowski-Shoplik, 2012) Talent Search, and Sternberg's (2003, 2005, 2009 via Subotnik et al., 2011) Wisdom, Intelligence, Creativity, Synthesized (WICS) model. Of these four models, only three (i.e. The ETM, Talent Search, and WICS) have become widely-adopted, systematic programs (Subotnik et al., 2011); however, the effectiveness of these models in "developing talent in specific domains" (p. 29) is questionable since "there have been no comparisons of [these] models using experimental studies" (p. 29). Other theories presented include Gardner's MI (Gyarmathy & Senior, 2016); Renzulli's (2012) Intelligence outside the Normal Curve *(Operation Houndstooth and Executive Functions)*; Sternberg's Theory of Successful Development and Triarchic Theory (Ayers & Seward, 2016; Jarvin & Subotnik, 2015); Moon's Personal TD Theory, Lent, Brown, and Hackett's Social Cognitive Career Theory (Ayers & Seward, 2016), and Vygotsky's Zone of Proximal Development (ZPD) (Gyarmathy & Senior, 2016).

The ETM is one of Renzulli's (2012) "four research-based sub-theories" (p. 150)[10] on giftedness and trusts that inductive and deductive learning are important to the developmental process and that people should experience both types of learning (Renzulli, 2012). Renzulli (2012) describes inductive learning as student-driven, constructive, and real-world learning and deductive learning as teacher-driven, prompt and response learning in which *good lesson learners* are celebrated. ETM addresses both inductive and deductive learning through three

[10] Renzulli's (2012) four research-based sub theories on human potential are The Three-Ring Model of Giftedness, the ETM, Operation Houndstooth, and Executive functions.

types of enrichment. *Type 1* involves identifying and building interests through exposure to new information; *Type 2* involves promoting creativity and enhancing problem-solving skills and communication skills while also being resourceful, and *Type 3* involves synthesizing the interests and skills gleaned during Type 1 and Type 2 and applying them to authentic, real-world scenarios.

Gyarmathy and Senior (2016) wrote that "In the practice of complex understanding and development through activity, it is especially important to have a usable framework for secure orientation" (p. 12). In an effort to establish such a framework, the authors related the various Bloom's cognitive levels to Renzulli's ETM. The authors then presented the ages when the different types of cognitive activities and levels of TD should be nurtured. The alignment between Blooms Taxonomy, the ETM, and approximate ages that skills and talents typically manifest appear below in Table 3.

Table 3

Alignment between Blooms' Taxonomy, Renzulli's ETM, and Age of Talent Development/Manifestation (Gyarmathy & Senior, 2016)

Bloom's Taxonomy	Renzulli's ETM	Age
Knowledge & Comprehension	Type 1	Eight
Application & Analysis	Type 2	Not Specified
Synthesis & Evaluation	Type 3	Adolescence/Adulthood

Similar to Gyarmathy and Senior (2016), Subotnik et al. (2011, via Subotnik et al., 2017), wrote that foundational skills and growth mindsets, or ETM Type 1 instruction, should be promoted in young children whereas teenagers should be encouraged to question conventions and think outside of the box. Likewise, Olszewski-Kubilius & Thomson (2015) wrote, based on Subtonik et al.'s (2011, via Olszewski-Kubilius & Thomson, 2015) idea of talent evolution, that TD should progress in the following manner: *Young Children (Potential) -> Adolescence*

(Competence/Mastery) -> Adulthood (Success in Field and Creative Productivity) and that elementary and middle schools should focus on developing students' content knowledge and supplement or enrich their instruction as needed. They also wrote that high schools should spend more time on skill development through advanced coursework (i.e. Advanced Placement or International Baccalaureate), independent studies, and authentic, real-world projects and experiences. Similarly, Dai (2017) believes that students should acquire foundational skills in elementary school, should cultivate skills and talent in secondary school, should personalize them in secondary or post-secondary school, and should employ them creatively in adulthood.

When considering various TD theories and models, certain themes emerged. For instance, most, if not all, of the TD programs reviewed discussed creativity, culture, enrichment (both within and outside of schools), environment, individual characteristics (genetics), parent and community involvement, psychosocial skills, and sound, responsive, and authentic (real-world applicable) instruction. Subotnik et al. (2011) summarizes these apparent tenets of TD by saying that "Giftedness is the result of the coalescing of biological, pedagogical, psychological, and psychosocial factors" (p. 3), and have been addressed through Renzulli's work. For instance, Operation Houndstooth (OH) is a social capital theory that is concerned with how and where social, emotional, and interpersonal intelligence, referred to as co-cognitive traits, intersect with cognitive traits (Renzulli, 2012), and Executive Functions (EF) which are "Broadly defined as the ability to engage in novel situations that require planning, decision-making, troubleshooting, and compassionate and ethical leadership that is not dependent on routine well-rehearsed responses to challenging combinations of conditions" (p. 156). ETM, OH, and EF are built upon Renzulli's *Three-Ring Conception of Giftedness* (T-RCG). The T-RCG asserts that talents emerge when high-ability, motivation, and creativity intersect and is where Renzulli and Reis'

(1997 via Hernandez-Torrano & Saranli, 2015 and Mueller-Oppliger, 2010) Revolving Door Identification (RDI) is useful since it allows students to enter and exit advanced programming (i.e. Acceleration or Enrichment) when their talents emerge or plateau. For example, a talent might appear during an activity that aligns with a student's intelligence, the student could then begin advanced instruction that aligns with his or her ZPD to develop that talent as far as possible, and then, when the talent plateaus, he or she would return to general education programming. This example not only highlights how the RDI might work but also shows how different intelligence theories might overlap within a TD framework.

Talent Development to Increase Gifted and Talented Program Access

In *Addressing the Achievement Gap Between Minority and Nonminority Children: Increasing access and achievement through Project Excite,* Olszewski-Kubilius (2006) wrote about the American achievement gap and how non-white students in the United States typically do worse than their majority peers "on almost every indicator of achievement." (p. 28). In her article, Olszewski-Kubilius (2006) highlights that the achievement gap is not unique to low-functioning students but exists among high-ability students as well. Olszewski-Kubilius then proceeds to discuss two TD programs intended to leverage minority access to G&T education. The first, she mentioned briefly and not in-depth, is Project Synergy which is a program in New York City that targets Kindergarteners and reportedly contributes to significant gains on standardized test and IQ scores (again, specifics were not provided). The second, covered more thoroughly, is Project Excite. Project Excite is a collaborative partnership between Northwestern University and the Evanston Township School District in suburban Chicago. According to Olszewski-Kubilius, Project Excite seeks to improve gifted minority high school students' achievement to hopefully increase access to both advance programs and advance math and

science coursework. Students are reportedly selected for Excite in third grade using a host of measures which include: State-level, criterion-referenced tests, the NNAT, a locally designed prealgebra readiness assessment, curriculum-based chapter and cumulative assessments, report card grades, and teacher evaluations. Once admitted to Excite, students and their parents receive support and enrichment through wrap around services that address academic and mental health to hopefully meet any underlying needs and to facilitate their (the students') talent development. Olszewski-Kubilius wrote that Project Excite participation has waned over the years, due to transiency, but that it has also helped increase proportionality in advanced classes from less than eleven-percent minority per advanced math or science class to eighty-percent of the minority student population participating in advanced classes, although achievement in these programs varies. Due to varied effects, the district offers tutoring for those who are struggling. Similar to Project Excite findings, Fellinger et al.'s (2017-b) SOAR research indicated achievement gains across ten skills; however, unlike Project Excite and Project Synergy, SOAR does not seem to have affected G&T proportionality, at least not yet.

Fellinger et al.'s Purpose, Methods, Findings, Commendations and Recommendations

Purpose

Prior to Fellinger et al.'s evaluation (2017-a), "there [was] an uneven distribution by race/ethnicity, economically disadvantaged students (EDS), students with disabilities (SWD), and ELL [in SPS's G&T program] when compared to the percentages of those students in the [district's] general population" (p. 12). As a result, SPS developed and implemented the SOAR program to better develop and identify its potentially gifted students by enhancing their reasoning and problem-solving abilities and exposing them to the language and vocabulary that

appears on the CogAT assessment. For clarity, SPS administers the CogAT assessment to third-grade students to determine both G&T and accelerated math eligibility.

Also, before Fellinger and colleague's (2017-a) investigation, SPS "conducted a limited evaluation of [SOAR] at the end of the first year of implementation" (p. 16). After year three, SPS requested "a refined an improved formative evaluation on the efficacy of the program" and recommendations for improvement along with ways "to ensure sustainability in regard to continued teacher implementation of program practices" (p. 17). Fellinger and company responded to SPS's requisition with the goal of "determ[ing] what impact, if any, [SOAR] has had on short and long-term goals thus far" (p. 11.). Additionally, Fellinger et al. set out to explore teachers' perceptions and ability to identify giftedness in underrepresented populations, whether or not SOAR activities enhanced students' performance on the CogAT, and if SOAR participation led to "increases in gifted referrals and eligibility and the number of fourth grade students identified for accelerated math" (p. 58). At the time of Fellinger et al.'s inquiry, SPS was still experiencing disproportionality in its G&T program and the researchers' aimed to formatively investigate SOAR's successes and needs for improvement so the district could "understand the efficacy of the program thus far as well as ways policies and practices might be altered to bolster program goals" (p. 60).

Methods

Fellinger et al. (2017-a) assumed a quasi-experimental approach to their study, which was appropriate since their inquiry was ex-post facto, or conducted after the "intervention has already occurred" (McMillan, 2012, p. 194), and because they used data collected from students who were in predetermined classes (Creswell, 2014 via Fellinger et al., 2017-a; McMillan, 2012). The authors contended that quasi-experimental designs are fitting "when assessing educational

programs [because they] include the ability to define and limit variables, use of pre-existing groups, and data/numbers to support recommendations or implications for the future of a program or policy" (Fellinger et al., 2017-a, p. 62; McMillan, 2012). The authors also acknowledged that quasi-experimental studies have limitations, particularly in securing baseline data for comparative purposes (Creswell, 2014 via Fellinger et al., 2017-a).

Fellinger et al. (2017-a) used central tendencies and a *t*-test to analyze SOAR pre-test-post-test scores of second-grade students from six matched-pair classrooms (three that did and three that did not use SOAR) in three of SPS's Title I schools to determine if SOAR increased participating students' reasoning and problem-solving abilities. Similarly, the researchers used central tendencies, a *t*-test, and a Pearson *r* Correlation with SPS provided CogAT data that included matched-pairs of third-grade students from three classrooms of implementation and three classrooms of non-implementation schools' students to determine if past SOAR students demonstrated higher levels of reasoning and problem-solving abilities as compared to those who did not receive SOAR intervention. After receiving an *r*-value, the researchers used a regression model "to determine probability, statistical significance, and standard error" (p. 68) and to determine if CogAT scores could be predicted based on SOAR post-assessment data. They also used pivot tables to track and compare SOAR post-test and CogAT trends in historically underrepresented student populations.

To measure teacher perceptions regarding potential giftedness in students belonging to historically underrepresented populations, Fellinger and colleagues (2017-a) revised, piloted, pre-tested, and deployed a modified version of a previously vetted culturally, linguistically, economically disadvantaged (CLED) teacher attitude survey that SPS had used before. Fellinger et al. sent the CLED survey, via Google Forms, to twenty-six current SPS teachers, twelve

SOAR and fourteen non-SOAR teachers, who taught in 2014-15 and/or 2015-16. "The survey consisted of forty-seven questions divided into three sections: thirty-two Likert scale questions on perceptions, three open-ended questions on perceptions, and twelve multiple choice/multiple answer demographic questions (teaching experience, education level, age, race/ethnicity, etc.)" (p. 70). Due to a low response rate, despite concerted recruitment efforts (initial deployment followed by three reminder emails sent in December 2016 and January 2017), the researchers still opted to compare survey results to determine "similarities and differences across the groups and questions" (p. 72). Prior to their comparison, the researchers employed the Wave Analysis Technique to control for non-response bias and to assess the validity of participants' responses before analyzing them.

Fellinger's team used *t*-tests and pivot tables to assess matched-pair G&T referral and eligibility data within and later across three years (2013-14, 2015-16, and 2016-16) to determine if SOAR participation impacted referrals and G&T program access for students belonging to historically underrepresented populations. For clarity, *t*-tests were used for means comparison to determine things such as the likelihood of underrepresented students being referred for G&T evaluation in SOAR versus non-SOAR schools, the likelihood of majority students being referred for G&T evaluation in SOAR versus non-SOAR schools, if referral and eligibility data between the groups was statistically significant, and if referral and eligibility data by school year (2013-14, 2014-15, and 2015-16) and across school years was statistically significant. In addition to determining statistical significance, the researchers used pivot tables to identify trends in underrepresented populations' subgroup data.

Fellinger et al. (2017-a) also used central tendencies, pivot tables, and a Relative Frequency Analysis to analyze 2015-16 matched-pair data from fourth-grade students to explore

the impact of SOAR on accelerated math eligibility. Again, the researchers used the latter methods to identify and analyze trends among historically underrepresented populations.

Limitations

Fellinger's team (2017-a) wrote that "Circumstances beyond both the researchers' and client's control, including some unobtainable data [possibly due to program infancy], comprised many of [their study's] limitations" (p. 82). For example, they claimed that some unknown and potentially influential factors (i.e. teacher's SOAR experience, participating teachers' support for the program, and non-participating teachers' adoption of SOAR's methodologies) might have affected the available data. They also specified that missing student identifiers made it difficult, if not impossible, to recognize relationships between SOAR pre-test-post-test data and CogAT results. The researchers further noted that "the size of the study may have limited the ability to determine whether or not there was a significant impact on CogAT scores for those students participating in the treatment" (p. 83). An additional shortcoming, which served as the basis for the current study, involved low survey response rates. The researchers also recognized the need for additional research to assess eligible students' longevity in the program and to determine if SOAR affected those later identified for Gifted and Talented (G&T) or accelerated math services (i.e. post-third-grade).

Findings

RQ 1. Do the second-grade students in the TDP classes demonstrate an increase in reasoning and problem-solving abilities after participating in the TDP?

According to Fellinger et al. (2017-a), students' mean scores on the SOAR assessment increased from pre-test to post-test in almost all schools across all indicators with few exceptions (i.e. Boxwood A remained stagnant in the Listening Comprehension, Boxwood B and Harrington C decreased in Goal Setting, Harrington D decreased in Figure Analogies, and Randolph F decreased in Logic). It should be noted that in some schools (i.e. Boxwood A and Boxwood B) mean pre-test scores, on specific indicators (i.e. Algebraic Thinking), equaled zero; therefore, growth occurred from pre-test to post-test. One potential suggestion for low-growth is that one year might not have been enough time to eradicate existing knowledge and opportunity gaps. Nevertheless, data analyses revealed that individual schools' standard deviations were lower on post-tests versus pre-tests thereby indicating less variability in the data thereby strengthening faith in post-assessment data. Collectively, the six schools experienced a seventy-four percent mean and a sixty-seven percent median growth from pre-test to post-test. The results of a *t*-test further confirmed that the observed increases from pre-test to post-tests were statistically significant, and a Pearson *r* Correlation confirmed positive growth from the former assessment to the latter assessment. Fellinger et al. also specified that "Overall, the treatment schools reveal a significant in reasoning and problem solving for their students" (p. 95).

RQ 2. Are students in the TDP classrooms demonstrating higher levels of reasoning and problem-solving abilities than their peers in non-TDP classrooms?

Fellinger and colleagues (2017-a) compared students' average quantitative, verbal, composite, and nonverbal performance on the CogAT using means comparisons. Ultimately, the

researchers found that the treatment group's quantitative mean was slightly higher (+ .30) than the control group's mean, that the treatment group's verbal mean was higher (+ 3.68) than the control group's mean, that the treatment group's composite mean was higher (+ 3.27) than the control group's mean, and that the treatment group's nonverbal mean was higher (+ 3.59) than the control group's mean. The researchers also took care to highlight that the treatment group's variability was higher than that the control group's variability with a range of 24.6-58.5 and 23.89-25.62 respectively. The higher variability in the treatment group indicates inconsistencies in results making it difficult to establish a consistent relationship between treatment and outcome and indicates that results could be due to error (McMillan, 2012).

Fellinger's team (2017-a) then used a Pearson *r* which revealed a moderate, positive relationship between SOAR post-test data and CogAT data. The researchers confirmed the positive relationship using a scatterplot which revealed an upward trend.

Next, Fellinger's group (2017-a) ran a regression which revealed moderate positive relationship between post-test data and CogAT scores. More specifically, the researchers found that the SOAR post-test scores explain about thirty-six percent of the variability in CogAT scores revealing that the post-assessment has some predictive validity. ANOVA results further confirmed a statistically significant relationship between the SOAR post-test and the CogAT scores at a ninety-five percent confidence level.

Additionally, Fellinger et al.'s (2017-a) pivot tables revealed that both males and females who participated in SOAR performed better on the CogAT than those who did not. These tables also revealed that White and Multiracial students who participated in SOAR performed better than their similar peers who were in the control group. Alternatively, Asian, Hispanic, and African American students who were in the control group outperformed their SOAR

counterparts. Non-ELL, SWD, and EDS students performed better in the treatment group than the control group whereas those qualifying as ELL, SWD, and EDS performed better if they were in the control group. In other words, SOAR seemed to positively affect those belonging to the following subgroups: Male, Female, White, Multiracial, Non-ELL, Non-SWD, and Non-EDS.

RQ 3. Does participation in the TDP impact teachers' perceptions of potential giftedness in historically underrepresented populations when compared to non-participating teachers?

Demographic data gleaned from survey participants revealed that all contributors had taught for ten or more years, one of the five had an advance degree, four of the five were white and the fifth was African American, and all participants were forty years old or older.

As previously written, Fellinger et al.'s (2017-a) survey response rate was low at nineteen percent and only had five total respondents; four from the experimental group and one from the control group. Due to this low-participant response rate, Fellinger and colleagues (2017-a) used the Wave Analysis Technique to control for non-response bias. According to the results of this technique, the second wave of the survey appeared valid; although, the researchers cautioned that "limited responses and lack of a mean score and standard deviation for the first wave skewed the results [and may have] impacted the data" (p. 109). Nevertheless, the researchers compared survey data in light of three themes, which were: Student Potential/Ability, Curriculum, Services, and Accommodations, and Testing and Identification Procedures.

Regarding ability, the teachers were divided on CLED students' capacity to perform in advanced programming but all agreed that CLED students demonstrate above average aptitudes and do so in different ways. Participants also seemed to believe that giftedness transcends socioeconomic status as well as cultural and linguistic groups.

Survey respondents tended to agree that G&T services held cultural benefits for CLED students. Contributors also tended to be neutral or negative on the topics of curricular modifications. The researchers wrote that "responses in this category [on the survey] are spread across the spectrum from strong agreement to strong disagreement" (p. 111) indicating that responses on differentiation were inconsistent and likely inconclusive.

Fellinger et al.'s (2017-a) interpretation of teachers' perceptions regarding testing and identification procedures revealed that respondents agree on questions related to identifying CLED students for G&T, identification procedures, and support for inclusion. The researchers wrote that additional information is needed for reasons leading to non-eligibility and general education teachers' capacity to identify giftedness in CLED students. More specifically, they wrote that "the similarity in how teachers responded to questions about why students do not qualify for gifted programs or whether general education classroom teacher possess the expertise to recognize gifted CLED students indicates the need for more in-depth information" (p. 113).

Three of four participants responded to all of the open-ended questions that appeared on the survey. Their responses indicated that SOAR participation, teacher observation, and classroom performances were most effective and that standardized tests, grades, and timed assessments were least effective when identifying CLED students for G&T. Contributors also identified language, lack of personal experiences, and teachers' ability to identify CLED students for G&T as barriers.

Poor participant response made it difficult for Fellinger et al. (2017-a) to adequately respond to their third research question thereby preventing the researchers from answering their third research question. As a result, the researchers called for additional qualitative research that utilized focus groups and/or interviews to gather additional information on perceptions.

Fellinger and colleague's call for further research on SPS's staff perceptions served as an impetus for the current inquiry.

RQ 4. Does student participation in the TDP impact the number of gifted referrals and/or eligibility of historically underrepresented populations when compared to non-participating students?

Before responding to this question, Fellinger et al. (2017-a) confirmed that the composition of students in SPS's G&T program remained disproportionate. The researchers specifically identified Black, Hispanic, SWD, ELL, and EDS students as those "mainly" affected by disproportionality. Using the RDCI 1:1 comparison, these were underrepresented in SPS's G&T program by approximately twenty-three, nineteen, nine, fourteen, and thirty-nine percent respectively. For transparency, SPS recognized that the EDS group was the most discrepant subgroup in terms of proportionality and is the reason that SOAR lives in Title I schools.

Fellinger et al. (2017-a) used *t*-tests to evaluate statistical significance in both those referred and those found eligible for G&T in 2013-14. The results of the *t*-tests revealed no significant difference in the referral rates of historically underrepresented students who participated in SOAR versus those who did not; however, a *t*-test revealed a statistical difference ($p < .05$) in majority students who participated in SOAR as compared to those who did not. More specifically, non-SOAR majority students were more likely to be referred for G&T evaluation as compared to those in the SOAR program.

Fellinger's team (2017-a) did not find statistically significant differences in 2013-14 G&T eligibility rates overall, for underrepresented students, or for majority students.

Means comparisons (*t*-tests) assessing 2014-15 G&T referral and eligibility data revealed no significant differences in referral and eligibility data of SOAR and non-SOAR students in five

out of six tests; however, the researchers found statistical significance ($p < .05$) when comparing underrepresented SOAR and non-SOAR students. More specifically, they found in 2014-15, underrepresented students who participated in SOAR had a greater chance at being referred for G&T evaluation than their non-SOAR counterparts.

Fellinger et al.'s (2017-a) analysis of 2015-16 referral and eligibility data revealed that when considering all students (underrepresented and majority) a significant difference ($p < .05$) existed between treatment and control groups when it came to G&T referrals. Similarly, when comparing underrepresented students in SOAR versus non-SOAR schools, the researchers found statistical significance ($p < .05$). In both instances, SOAR students were more likely to be referred for G&T consideration than non-SOAR students. The results of a *t*-test analyzing the referrals of Majority students revealed no statistical significance. Like the referral results, eligibility *t*-tests revealed statistical significance ($p < .005$) in both the Overall and Underrepresented categories. In both cases, non-SOAR students were more likely to be found eligible for G&T services; however, a *t*-test comparing the means of Majority SOAR versus non-SOAR students revealed no statistical significance.

The results of *t*-tests analyzing referral and eligibility data for the 2013-14, 2015-16, and 2016-17 school years combined revealed statistical significance ($p < .05$) in the Overall and Underrepresented referral analyses, but not in the Majority analysis. The Overall and Underrepresented analyses revealed that SOAR participants had a better chance of being referred for G&T evaluation than non-participants.

Regarding 2013-14, 2015-16, and 2016-17 combined eligibility, none of Fellinger et al.'s (2017-a) analyses revealed statistically significant results.

Taken together, Fellinger and colleagues (2017-a) results show that SOAR has had a statistically significant impact on SPS's G&T referrals, but not found eligibility. To this point, Fellinger et al. wrote that "Underrepresented students who participated in the talent development program had an increased likelihood of being referred for gifted education; however, underrepresented students who did not participate had an increased likelihood of being found eligible once they were referred" (p. 153).

RQ 5. Are schools that participate in the TDP showing a greater increase in the number of fourth grade students identified for accelerated math when compared to fourth graders in non-TDP schools?

Before responding to this question, Fellinger et al. (2017-a) disclosed that their sample included only two accelerated math classrooms in non-SOAR schools versus three in SOAR schools.

Following their disclosure, Fellinger et al. (2017-a) discussed how they used pivot tables to determine the proportion of underrepresented students in the SOAR versus non-SOAR accelerated math classrooms. The results of their pivot table analysis revealed that there were more female than males in SOAR schools' accelerated math classrooms. They also found that there were more females, EDS, ELL, SWD, White, and Hispanic students and less Black students in SOAR school's accelerated math classes.

Implications

Fellinger et al. (2017-a) wrote that a child's environment might affect his or her growth in some of the SOAR assessment's metric categories (i.e. word analogies and vocabulary) due to exposure. They also wrote that marginal growth in the measure's quantitative and logic categories might be related to developmental, not environmental factors.

The researchers explained that SOAR students performed better on some CogAT indicators (i.e. verbal, composite, nonverbal) while their non-SOAR counterparts performed better on the assessment's quantitative components (Fellinger et al., 2017-a). They also wrote that large variability existed in the data and expressed a need for additional research to explore factors affecting how SOAR impacts students.

Fellinger and colleagues (2017-a) reported being confused since ELL, SWD, and EDS students performed better on the CogAT if they were in SOAR but performed better on the post-test if they were not in SOAR. This is another area where the researchers stated the need for further inquiry.

Fellinger's team (2017-a), despite concerns over low-participant response, wrote that the CLED survey responses indicate that SOAR has no bearing on teachers' perceptions; however, G&T referral data seems to show otherwise. The researchers also wrote that teachers seem to believe giftedness transcends subgroup status, that CLED students would benefit from inclusion in the G&T program, and that SPS needs better identification procedures; the belief that giftedness can exist in all types of students and support for CLED inclusion might signify strong professional development in cultural development. The researchers wrote that additional research is needed to further investigate perceptions and to evaluate whether or not teachers are implementing SOAR as designed and with cross-curricular connections.

The researchers were also confused because SOAR seemed to result in increased G&T referrals but did not correspond with found eligibility (Fellinger et al, 2017-a). They suspect a disconnect exists somewhere in the eligibility criteria or process, possibly related to nomination sources or school climate/culture, and suggested additional research explore reasons that might be causing this disconnect. They also advised that SPS review criteria documents to see if

indicators like “hobbies and interests of underrepresented students, special talents, preferred activities when alone, relationships with others, including older students and adults” (Fellinger et al., p. 176 citing Ford, 2011) are present.

Fellinger et al. (2017-a) wrote that while there seemed to be a disproportionate number of White students in the accelerated math program, underrepresentation was still being addressed because many of these students were identified as EDS or SWD. The researchers also questioned if have one less accelerated math class in the control school skewed their data and if all thing were equal if numbers would be more proportional.

Commendations of Sunnydale’s SOAR

Fellinger et al. (2017-b) commended SPS for its commitment to enhancing underrepresented students’ access to opportunities through early intervention thereby improving their ability to enter SPS’s advanced programs. The researchers applauded SPS’s success in building students’ capacity in the areas of higher-order thinking and problem solving. The authors also praised SOAR for increasing underrepresented students’ CogAT scores, for providing teachers professional development in the areas of G&T and multiculturalism, for increasing the number of underrepresented students’ referrals for G&T evaluation, and increasing the number of underrepresented students entering the accelerated math program in SOAR schools.

Recommendations for Sunnydale’s SOAR

In addition to their commendations, Fellinger and colleagues (2017-b) provided many recommendations on the ways that SPS could improve SOAR. For example, they recommended creating a complete local database with specific student identifiers to allow data to follow students to different schools within the district for program evaluation purposes; providing parent

training and increasing opportunities for parent involvement (Berger, 1992 & USDOE, 1998 via Fellinger et al., 2917-a), and providing reading and writing instruction to English Language Learner (ELL) students in their native languages (Brisbois, 1992 & Cisco & Padron, 2012 via Fellinger et al., 2017-a). The authors argued that instructing students in their native languages might these increase ELL students' scores on the CogAT (Brisbois, 1992 & Cisco & Padron, 2012 via Fellinger, 2017-b). Fellinger et al. (2017-b) also suggested that Sunnydale Public Schools (SPS) explore whether or not environmental factors and/or other variables are affecting certain subgroups' (i.e. ELL, Students with Disabilities (SWD), and Economically Disadvantaged Students (EDS)) scores on the CogAT; locally norm the CogAT; establish a district-wide definition of giftedness that expands beyond the canonical view of giftedness, and hire and train job candidates whose demographics reflect those of the students (Aud, Hussar, Kena, Bianco, Frohlich, Kemp, & Hannes, 2013, Bernal, 1981 & Castellano, 1998 via Fellinger et al., 2017-b; Castellano, 1998; Ford & King, 2014). Some other recommendations included tracking referral data longitudinally to see if SOAR students are later referred and found eligible for the division's Gifted and Talented (G&T) or accelerated programs; following eligibility data longitudinally to see how students perform and if they remain in the G&T or accelerated program; examining the referral and eligibility data to determine why there is a discrepancy between the two; monitoring eligibility type (i.e. English only, math only, or both) for trends by school type (i.e. SOAR or Non-SOAR); increasing the number of underrepresented students participating in the SOAR program to prepare them for accelerated programs, and increasing the number of accelerated math offerings.

Summary

The concept of giftedness has existed since ancient times and varies according to what people value in a given place or point in time (Gyarmathy & Senior, 2016; Renzulli, 1978 via Ayers & Seward, 2016; Robins, 2010; Subotnik, Olszewski-Kubilius, & Worrell, 2011). The GCP or what has seemingly become the traditional take on giftedness is often conflated with unidimensional intelligence (Gottfredson, 1997; Gyarmathy & senior, 2016; Herrnstein & Murray, 1994 via Dai, 2015; Jarvin & Subotnik, 2015; Mandelman et al., 2010; McBee, 2006; Plucker & Callahan, 2014; Subotnik, Stoeger, & Olszewski-Kubilius, 2017). The GCP is also rooted in hereditarian research which with the media's assistance has led to the faulty practice of using unitary measures like IQ and aptitude tests to arrive at a single number that supposedly signifies a person's innate capacity (Gould, 1981, Mansfield, 2015, 2016). Unfortunately, such numbers have been used to rank-order and sort people and groups of people both in the American military (Gould, 1981; Lagemann, 2000 via Robins, 2010; Mansfield, 2016) and in schools (Gould, 1981; Mansfield, 2016; Robins, 2010). Some researchers (i.e. Dai, 2017; Ford & Grantham, 2003; Gyarmathy & Senior, 2016; Mansfield, 2016; Ward, 2005) claim that placing students on academic career paths is faulty, exclusionary, and leads to segregation – which, if true, is concerning given the United States' changing population (Siek and Sterling, 2012).

Recognizing G&T program disproportionality as a problem, SPS developed and implemented a talent development program called SOAR (Fellinger et al., 2017-a). All second-grade students in participating Title I schools receive SOAR instruction and participate in related activities which the district hopes will enhance their reasoning and problem-solving skills and prepare them for the vocabulary and language that they will see on the CogAT. For clarity, the CogAT is the primary measure that SPS has used to determine G&T eligibility.

At the time of Fellinger et al.'s (2017-a) investigation, SOAR was in its third year of implementation. At that time, the program had only had one limited evaluation which occurred at the end of its first year. Realizing the need for a more thorough evaluation of SOAR, SPS requested help in determining the program's efficacy, areas of strength and weakness, and suggestions to promote continued support from involved staff members. Fellinger and colleagues responded to SPS's request and embarked on a quasi-experimental investigation that was largely quantitative; although, it had a qualitative component.

By and large, based on Fellinger et al.'s (2017-a) work, SOAR seems to have had many positive impacts. For example, participating students' scores appeared to increase on the SOAR assessment from pre- to post-test. Their scores also appeared to be higher on the CogAT too. Additionally, the program seemed to positively impact teachers' ability to identify and refer CLED students for G&T evaluations as indicated by increased G&T referrals. SOAR also appeared to have a positive impact on historically underrepresented students in SOAR schools in terms of accelerated math access. Of course, as with all interventions and research, there were limitations (i.e. limited data sets, missing student identifiers, a low survey participant response rate, etc.) that led to suggestions for further exploration and room for methodological and programmatic improvement.

As previously stated, Fellinger et al.'s (2017-a) study sought, in part, to explore whether or not SOAR participation influenced teachers' perceptions of potential giftedness as compared to non-participating teachers. Unfortunately, only nineteen percent, or five total participants, responded to Fellinger's survey and the results failed to adequately address the prompt. As a result, the researchers called for additional qualitative research that employed focus group and/or

interview data collection methods to gather more information on perceptions that can be considered alongside their quantitative findings; hence, the current study.

As stated early on, the current study sought not only to add to Fellinger et al.'s (2017-a) research but also to add to the TD and G&T theoretical knowledgebases, particularly as a vehicle to enhance racial and ethnic proportionality of related programs, and to provide participant and researcher insights that, when considered in light of other research, might position all students to achieve self-actualization thereby better preparing them for life in a majority-minority America.

Chapter Three: Methodology

As reported in Chapter One, I used qualitative methods to better understand Sunnydale Public Schools' (SPS's) teachers', Build-Level Administrators' (BLA's), and Gifted and Talented (G&T) Department members' perceptions of SPS's SOAR program. I chose to pursue this investigation qualitatively based on Fellinger et al.'s (2017-a) recommendation that future SPS SOAR researchers collect "qualitative data in the form of interviews and/or focus groups" (p. 83). I also opted for a qualitative approach since qualitative investigations yield rich descriptions that result in verbal insights and quotations which explain *how* and *why* participants believe what they do (Meriam & Tisdell, 2016). Below, I discuss my methods more thoroughly by first identifying and describing the research paradigms that provide the theoretical framework for this study, then discussing participants, recruitment methods, and procedures used for data collection, and lastly sharing my data analysis processes and possible limitations.

Theoretical Framework

Postmodernism, interpretivism, constructivism, and subjectivism served as the theoretical bases for this inquiry. In this section, I briefly discuss each of these paradigms. Then, I succinctly highlight their interconnectedness and describe how their intersection relates to my investigation. In later chapters, I organize my interpretations of participants' perceptions of SOAR in light of existing literature and my experiences in hopes that my understandings might inform SPS's SOAR policy and practice, transfer to talent development (TD) programs in other school systems of similar contexts, and add to the TD and Gifted and Talented (G&T) education knowledge bases.

Postmodernism

Postmodernism is “a late twentieth-century movement [that is] characterized by broad skepticism, subjectivism, or relativism; a general suspicion of reason; and an acute sensitivity to the role of ideology in asserting and maintaining political and economic power” (Duignan, 2017). It is also “the label [that has been] applied to cultural change over the past century” (Paul, 2005, p. 29). Expressly, postmodernism considers the decisive differences that exist beyond conventionally accepted concepts. For example, if positivistic research is science’s gold standard, then postmodernists suppose that any and all other approaches to scientific inquiry are postmodern (Paul, 2005). Postmodernists also reject absolute truths and morals, view reality as imaginative, and trust that one's interpretation of language, social structures, social institutions, and history informs his or her knowledge and reality (Duignan, 2017). Predicated on the assumption that “reality, knowledge, and value are created by discourses,” and that they do not live beyond one’s mind, postmodernists presume that there is no right or wrong way of knowing; therefore, they either value or dismiss all ways of knowing equally. Simply put, postmodernism is “a reasoned critique of many of the assumptions of the modern period; a reaction to modern philosophy, pondering in whose collective interest is scientific inquiry advanced; it is sometimes regarded as a complex cluster of categories of inquiry within a suspicion of grand metanarratives, seeking to understand discrepancies between what we purport to know and what actions we take because of that belief” (Paul, 2005, p. 330).

Interpretivism

Bochner argued in his part of Paul’s (2005) text that knowing and significance are confounded with the knower’s mind and that one cannot remove his or herself from his or her mind to objectively “mirror nature” (p. 65); therefore, “the mind plays an active role in the

construction of reality." (p. 47). Merriam and Tisdell (2016) echoed Bochner's sentiments when they wrote that interpretive research is subjective and that interpretivist believe "reality is socially constructed, there is no single observable reality, and researchers do not 'find' knowledge, they construct it." (p. 9). Put differently, interpretivism is value-laden (Paul, 2005), context-specific, and intended to describe, understand, and interpret multiple realities (Merriam & Tisdell, 2016).

Constructivism

Merriam and Tisdell (2016) wrote that "Constructivism is a term often used interchangeably with interpretivism" (p. 9). Similarly, Paul (2006) quoted Lincoln as saying that constructivism is "an interpretive stance which attends to the meaning-making activities of active agents and cognizing human beings" (p. 44). In other words, reality is the knower's interpretation and understanding of the world at a given time based on various "inputs and interpretations" (p. 46).

Subjectivism

In *Subjectivism and the Mental*, Merlo (2016) explained subjectivism using people's perception of chocolate. He wrote that chocolate tastes good to some individuals and not to others and that while some might claim that chocolate tastes good, they also recognize that not everyone agrees with their perspective. Relatedly, chocolate lovers realize that some people would disagree with their viewpoint and claim that their stance is false because they understand that what is true for them might not be true for others. Correspondingly, in education, one student might claim that an instructor is a good teacher while their peers might disagree. Similarly, one educator might feel that one intervention program is the best while their colleagues might think another intervention program is better. As indicated in the explanation

following Merlo's (2016) chocolate example, subjectivists acknowledge that all people have different points of view which are manifestations of their different interpretations of reality and that their understanding informs their unique ways of knowing. In other words, subjectivists believe that "at least some of the facts that constitute reality are subjective rather than objective (p. 315)," and that "objective facts are not the only facts there are" (p. 315).

Taken together, postmodernism, interpretivism, constructivism, and subjectivism have interrelated qualities. For instance, none of these paradigms are positivistic and they are all value-laden (Paul, 2005). As such, those who subscribe to these models are interested in multiple points of view and accept that reality exists in the knower's mind and is shaped by his or her experiences. Since the current study includes various perspectives, interpretations, and constructed understandings of SPS's SOAR program based on data collected from interviews and focus groups, document analyses, Fellinger and colleague's (2017-a) findings, and existing literature it includes numerous realities, is subjective by nature, and lives amongst the four aforementioned paradigms.

Participants

In Fellinger et al.'s (2017-a) attempt to answer the question *Does participation in [SOAR] impact teachers' perceptions of potential giftedness in historically underrepresented populations when compared to non-participating teachers?* the investigators targeted all second-grade teachers in six of SPS's Title I schools.[11] They also reported that they purposely chose Title I schools for their study since Title I schools "serve a relatively more diverse population in terms of race/ethnicity and socioeconomic status (SES)" (p. 14). It should be noted that SOAR is

[11]Fellinger et al. (2017-a) zeroed in on second-grade since SOAR is exclusively a second-grade program that is used to prepare students for the CogAT test that is administered in third-grade and to help identify students "for the accelerated math program" (p. 14) which begins in the fourth-grade.

solely housed in SPS's Title I schools. Further, because their research was primarily quantitative, Fellinger and colleagues (2017-a) only used data from six schools; three of which house SOAR and three others that served as matched pairs.

Since the current study is qualitative and thereby non-experimental, then there was no need for matched pairs; therefore, an SPS researcher recommended that I expand my sample to include participants from all seventeen of SPS's Title I elementary schools. She also suggested that I recruit participants from grade levels beyond second-grade since SPS now allows for G&T nomination and identification at all grade levels. Later, another SPS employee advised that only nine of the seventeen Title I schools have SOAR. Based on this information, I attempted to recruit second through fifth-grade teachers, BLAs, and gifted support specialists (GSS) who work at or are associated with SPS's SOAR schools as participants. I conducted most of my recruitment campaign through email using email addresses retrieved from school websites. The Gifted Education Coordinator (GEC) gave me a pdf titled *SPS's Gifted Education Support for Schools*. This file contained GSS's names and email addresses.

Following Institutional Review Board (IRB) approval, I sent participant recruitment emails along with an overview of my study to one hundred eighty-five SPS employees; one hundred sixty-two teachers, eighteen BLAs, and five GSSs. I sent these emails from late March to late May 2018. More specifically, I sent them to SPS teachers on three occasions during March and April, to BLAs on four occasions during April and May, and to the GSSs with elementary caseloads on one occasion in March. I sent subsequent messages to potential teacher and BLA participants based on limited responses from earlier attempts. I only sent one email to GSSs since four of the five qualifying GSSs responded to my first message and agreed to participate in my study. Additionally, I asked participants at the end of interviews and focus

group meetings to refer colleagues they believed might be interested or might provide relevant insights on SOAR. Some Gifted and Talented (G&T) participants indicated in informal conversations that they had talked with other participants indicating that some snowball sampling might have taken place.

Ideally, I had hoped that twenty volunteers would take part in my study; five from each category (i.e. teachers, (Building-Level Administrators) BLAs, and G&T staff). I chose twenty as a threshold because Guest, Bunce, and Johnson's (2006 via Mason, 2010) literature findings indicated that qualitative studies, depending on type (i.e. Ethnography, grounded theory, phenomenology, etc.), should include anywhere from five to fifty participants, and because Green and Thorogood (2009, via Mason, 2010) claimed that "the experience of most qualitative researchers (emphasis added) is that in interview studies little that is 'new' comes out of transcripts after you have interviewed twenty people or so" (p. 120). Since I aimed for saturation, I felt that twenty was a good place to start and decided that I would secure more participants if necessary. Unfortunately, only fourteen volunteers pulled through; six teachers, four BLAs, and four G&T staff members. Regardless of this perceived shortcoming, my number of contributors fell safely within the five to fifty range recommended by Guest, Bunce, and Johnson, and even though my participants' perspectives varied, commonalities exist in my data.

As a final note on my participation response rate and from my position as a former K-12 administrator and a current teacher, I find my low participant response rate unsurprising due to the time of year when I conducted interviews and focus groups.[12] I attribute my lack of surprise to my understanding that the volume of work (i.e. Preparing for and overseeing high-stakes testing, chairing, preparing, or participating in Individualized Education Plan (IEP) meetings,

[12] I hoped to conduct interviews and focus group sessions prior to Standard of Learning (SOL) testing but failed to do so due to Institutional Review Board (IRB) taking longer than anticipated to approve my study.

preparing for or conducting final evaluations, inventorying furniture and supplies, etc.) in the latter months of the school year increases exponentially and as a result time becomes a luxury, particularly for administrators. Relatedly, two teachers who participated in my teacher focus group told me that their colleagues asked them why they chose to participate in my study. They said that their peers felt like my study was "just one more thing." This and similar comments expressed during my teacher and GSS focus group sessions support my belief that both teachers and administrators were overloaded during my recruitment period and as a result, their workload might have affected my participation rate.

In an attempt to control for peoples' limited time, to mitigate added stress, and to overcome other factors inhibiting participation, I created an online focus group using a Google Doc. versus holding face-to-face sessions for BLAs, and I offered to communicate with some teacher and G&T participants over the phone or via email since I had already held focus group sessions with their colleagues. Using an online format not only allowed BLAs to respond when they had time but also allowed me to invite them to participate in a closed forum where they could not only respond to my questions but also build off of and respond to each other's narratives. Despite this concession, only four BLAs followed-through and participated in my study. Teachers and G&T participants seemed to appreciate my flexibility which I suspect enhanced my participant response rate; although, not as much as I had hoped it would. Overall, four teachers and two G&T staff members participated via phone or email. For comparison, only two teachers and two G&T staff members attended and partook in focus group meetings.

Instrument

In conjunction with my dissertation chair, I co-developed thirteen interview questions that aligned with my research questions. Then, with the permission of my former G&T director,

I sent an email to all elementary G&T teachers in my previous district inviting them to pilot or review and respond to my questions via email. Several teachers offered to help so I emailed them my questions. Five of these teachers sent me their responses which based on their responses seemed to confirm that my questions were clear. Eventually, I removed the question "How are students selected for the talent development program (aka SOAR)?" because it was not relevant considering that all second-grade SPS students in participating SOAR schools are automatically exposed to the program. The twelve interview questions that I used for interviews and focus groups appears in Appendix C.

Procedure

As indicated at various points throughout this chapter, I collected data during small online and face-to-face focus group sessions, phone and email interviews, document analyses, and Fellinger et al.'s (2017-a) findings. For transparency, I did not always collect data in the planned, preferred method (i.e. Face-to-face focus groups) but found that I had to monitor and adjust methods to gather as much data as possible. In the end, I believed having more information to consider during the sense-making process was more important than rigidly sticking to a predetermined design. That said, I trust that my rationale and concessions are acceptable based on the assumption that qualitative research is both "emergent and flexible" (Merriam & Tisdell, p. 18). Nevertheless, I present detailed information on my data collection processes in the "Focus Groups," "Interviews," "Document," and "Fellinger et al." subsections below.

Focus Groups

Due to my low participant response rate, I planned to hold focus groups instead of interviews to collect data for my investigation; however, I used both methods to increase my

contributors. For clarity, I opted for the former method based on the assumption that participants would interact with each other and their interplay would result in a richer understanding of SOAR (McMillan, 2012). I also felt using small focus groups appropriate since "some so-called focus groups are little more than a small group discussion" (McMillan, 2012, p. 294). As outlined below, my focus groups were "homogeneous with respect to important participant characteristics" for the purpose of "[assuring] that the voice of each group is clear and well-represented" (McMillan, 2012, p. 294). To enhance accuracy and so I could stay focused on the discussion at hand, I recorded both of my face-to-face focus groups after obtaining participant permission (McMillan, 2012). Later, I manually transcribed my recordings, double-spaced my transcriptions, added line numbering, password protected the files, and emailed the encrypted documents to participants for review and feedback. After receiving their approval, I moved forward with my data analysis.

As noted earlier, focus group participants met in homogeneous groups. More specifically, one of my focus groups included teachers, another GSSs, and the last BLAs. My teacher and GSS focus group participants met in face-to-face sessions while BLAs contributed online. The teachers met with me at an agreed upon elementary school and the GSSs met with me at a building that is centrally-located within SPS. Based on email exchanges, I entered each focus group location anticipating three to four teachers and three to four GSSs; however, due to unforeseen circumstances, some parties did not attend. Due to individuals' failure to show, both focus groups ended up having only two participants. Nevertheless, I met with those present, asked my twelve interview questions[13] and follow up questions, thanked them for their

[13] I used the same twelve questions for interviews and focus groups.

participation, and asked them to refer others who are interested or have something insightful to contribute.

As mentioned before, BLA participants provided feedback through a Google Doc. Before using this method, I asked BLAs via email if they were okay communicating through a closed, online document as opposed to a face-to-face session. I explained that posting my interview questions on the online forum would respect their limited time by allowing them to respond at their convenience, would allow focus-group type interplay between participants, and would not jeopardize their confidentiality any more than if they participated in a face-to-face meeting. The BLAs wrote back, agreed with my points, and claimed they appreciated my idea. After receiving their blessing, I created a Google Doc., inserted my twelve questions, and shared it with those who wished to participate. Some BLAs responded immediately, some never responded, and others responded after I sent follow-up reminder and recruitment emails. Ultimately, four BLAs participated in my online focus group.

Interviews

Due to my low participant response rate and some teachers' and GSSs' failure to attend the focus group sessions, I extended the option for people to take part in interviews either via email or over the phone. Overall, I spoke with three participants on the phone; two G&T staff members (the GEC and the GSS who rebranded SOAR) and one SOAR teacher, and three teachers (one CBG teacher, one SOAR teacher, and one general educator) responded to my twelve interview questions through email. As mentioned in the introduction to this section, I adjusted my interview protocol for the and SOAR's rebrander. I also hand-recorded phone participant responses, typed them into Word documents, encrypted the documents, and emailed

them to participants for review. As with focus group transcripts, I did not proceed with data-analysis until I received feedback or approval from participants.

During my GSS focus group and in my phone interview with the GEC, participants identified and credited a different GSS with rebranding and overseeing the SOAR program. The GSSs who participated in the focus group were adamant that I must speak with the rebrander. Initially, the rebrander planned to attend and participate in the GSS focus group but did not make it due to a medical issue in the home. After the focus group and since teachers and her G&T colleagues identified the rebrander as a "key informant" (McMillan, 2012, p. 292), I attempted to solicit feedback from her via email, but after reading my interview questions she shared that she felt it better if we spoke via telephone. On the phone, the rebrander shared that she did not feel well-positioned to answer some of my questions as written, since she is no longer in the classroom, and thought a less formal discussion might prove more fruitful and appropriate. I conceded, and we continued our conversation. Despite my concession, we were still able to cover pieces of my interview protocol and more. Topics breached during our talk included: the history and rebranding of SOAR, the purpose of SOAR, criteria to teach SOAR, BLAs and SOAR, the expansion or reduction of SOAR, SOAR professional development (PD), SOAR fidelity of implementation, SOAR's effectiveness, SOAR public relations, Fellinger's (2017-a) SOAR findings, and recommended changes to SOAR. Similarly, I made some concessions when interviewing the GEC; however, he and I followed my interview questions more faithfully as compared to my conversation with the rebrander.

Documents

I reviewed several SPS documents during my investigation. The documents considered included SPS's *2017-22 Plan for the Education of the Gifted* comprehensive plan, *SPS's 2017-18*

Gifted Education Services Brochure, a document titled *Understanding Your Child's Gifted Education Eligibility Report*, a memo from SPS's Chief Academic Officer and GEC to the superintendent, a Gifted Update which was presented to SPS's school board in March 2018, SPS's *Math, English, Science, and Social Studies Scales for Identifying Gifted Students, a Slocumb-Payne Teacher Perception Inventory* with instructions, and SPS's SOAR Flight Manual. SPS's GEC sent me most of these documents or links to them via email. The only exception is the blank Flight Manual that participants gave me in a focus group meeting. During the same focus group, participants presented a binder full of SOAR reference materials and a spreadsheet used to track student data to add emphasis and clarity to their points and to enhance my understanding. For clarity, I neither received a copy of these items for analysis nor did I see individual student data even though the spreadsheet had been partially completed.

Fellinger et al.

My dissertation chair sent me electronic copies of Fellinger et al.'s (2017-a) study on SPS's SOAR program and their corresponding executive summary. For clarity, Fellinger et al.'s (2017-a) investigation was the first and only formal investigation of SPS's SOAR program to date. Additionally, Fellinger and colleagues' (2017-a) research serves not only as this study's foundation but also as its third data source for it as well.

Data Analysis

After participants member-checked and corrected interview and focus group notes, I hand-coded each line of data by hand-writing descriptors in the right-hand margin of each page (Merriam & Tisdell, 2016). I also wrote codes in the right-hand margins of teacher and BLA participants' electronic responses and on informative documents like *SPS's 2017-18 Gifted Education Services Brochure*, its comprehensive plan, the memo from the district's CAO and

GEC to the superintendent, and Fellinger et al.'s (2017-a) works. After coding, I searched for patterns in my codes and grouped them into categories according to my "interpretation and reflection of meaning" (Richards, 2015, p. 135 via Merriam & Tisdell, 2016, p. 206). Afterward, I revisited my analytical codes and searched for motifs in my micro and macro level data to identify dominant themes (Merriam & Tisdell, 2016). Finally, I considered the emergent themes in light of my research questions and existing literature to develop my understandings which I later used to generate recommendations for SPS's SOAR policies and practices.

In addition to my efforts, a recent Ph.D., who is also a dean at a university abroad, reviewed my transcripts for themes and provided feedback that I compared my interpretations against. This colleague also proofread my study and gave additional feedback following her audit. By having her, an outsider, engage in the coding and theme identification processes and by comparing my interpretations to hers, I hope I added credence to my understandings and thereby enhanced the transferability and dependability of my tentative findings (Merriam and Tisdell, 2016).

Limitations

As mentioned before, this study, like all studies, has limitations and "claiming [those] limitations is a subjective process because [researchers] must evaluate [their] impact" (USC, 2018). That said, I not only pored over my methods and findings with a canonically critical eye and identified possible (traditional, arguably quantitative) shortcomings in the areas of causality, sample size, participant biases, researcher biases, interviewer effects, documents, credibility, transferability, dependability, and confirmability but also recognize that correcting these, and other, regularly cited limitations might not improve my study's outcomes or make them more valuable. For example, I (generically) argue that discovering or confirming that a medication has

a causal effect on reducing or eliminating a disease has little meaning if its side effects go undetected and negatively affect a person's quality of life. Furthermore, and specific to the study at hand, increasing sample size, adding district-level documents, or removing recording devices might not eliminate or reduce threats of bias and could even have the opposite effect. For instance, collecting more documents that are generated at the district-level might be riddled with rhetoric developed and propagated by those in power and might only sway understandings in favor of the district and deemphasize counternarratives. Surely similar arguments could be presented for each identified limitation category seeing as this is a qualitative study that does not conform to quantitative standards; therefore, many of the identified shortcomings are moot points. Nevertheless, it is with this understanding that I present my study's limitations below.

Causality

Because this study is qualitative and thereby nonexperimental, I could not and did not reach causal conclusions (McMillan, 2012). As suggested in the intro to this section, this study is concerned with participants' perceptions; therefore, causality would not be an appropriate goal for this investigation and as a result would not improve it.

Sample Size and Participant Biases

My participant response rate was lower than desired due to factors like using email as a primary recruitment method and/or the time of school year when I collected data. I believe that time likely had a sizable effect on my participation rate based on my experience as both a teacher and an administrator and since teacher focus group participants reported that their colleagues questioned their wish to take part in my study saying it was "just one more thing." As a result, some (presumably quantitative) researchers might argue that that my sample lacks representativeness and is therefore biased due to sample size and since four of six teacher

respondents teach SOAR which is exclusive to second-grade (McMillan, 2012); a possibly irrelevant point since this study sought to qualitatively understand *individuals'*[14] perceptions to inform the sense-making process. Writing of biases, I wonder if G&T contributors provided biased or socially desirable responses based on their professional positions; although, possible biases might have been offset since some G&T participants were purposefully recruited as key informants to diversify perspectives (McMillan, 2012). Interestingly, these key informants' views differed on an important purpose and goal of SOAR thereby further reducing my concerns of bias. Additionally, I trust that my data is credible since I achieved a degree of saturation and discovered themes across information collected from different homogeneous groups.

Relatedly, my teacher and G&T participant focus groups both contained only two people due to some participants' failure to show up to sessions. Despite this perceived setback, I proceeded with the meetings as planned to gather whatever data I could and requested that present participants refer colleagues (a la snowball sampling) who might be interested in and/or informative to my study (McMillan, 2012).

My BLA group was also small with four participants. I believe that more BLAs participated than teacher and G&T participants since I made a methodological concession to allow BLAs to participate in an online focus group using a Google Doc. I made this change based on a lack of initial responses, my professional experience which allowed me to empathize with BLA's time restrictions, and my understanding that qualitative methodologies are emergent and can evolve (McMillan, 2012; Merriam & Tisdell, 2016).

Similar to BLAs, I allowed teacher and G&T interview participants, who could not attend focus group sessions, to respond to my interview questions via email or over the phone. These

[14] Emphasis added

amended methods seemed fruitful since they increased my number of teacher and G&T staff participants; however, online participant responses to some questions seemed flat - possibly because of participant misunderstandings that I was unable to clarify in the moment (i.e. "What's TDP?")[15]. That said, I believe that I could have secured richer responses in person or on the phone, depending on the participant's original format, due to factors like the possible interplay between participants or the enhanced ability to pose follow-up, probing questions based on verbal (phone or in person) or nonverbal responses (in person) (McMillan, 2012; Merriam & Tisdell, 2016).

Other drawbacks associated with switching from in-person to online formats are that online environments can jeopardize confidentiality, garner responses from people other than intended, and might enhance socially desirable responses (McMillan, 2012). To thwart confidentiality concerns, I blind carbon copied (BCC) participants on emails, encouraged them to respond through personal, not work accounts, and I asked BLAs via email for permission before moving to an online forum.

Additional bias concerns might include motivation for participating, non-response bias, confidentiality when participating in focus groups, and the halo effect (McMillan, 2012; Merriam & Tisdell, 2016).

Researcher Biases

As outlined in my theoretical framework and based on the tenets of postmodernism, interpretivism, constructivism, and subjectivism, I assume that research is value-laden, not value-free (Paul, 2005); therefore, I did not attempt to divorce myself from my experiences for the sake

[15] Early iterations of my interview protocol contained the acronym TDP which Fellinger et al. (2017-a) used as an abbreviation for: *Talent Development Program.* Some email participants questioned what TDP meant and I clarified that it was SOAR while one or two others did not, left TDP questions blank, and did not respond to follow-up emails.

of claimed objectivity but instead highlighted them by positioning myself in Chapter One (Merriam & Tisdell, 2016). And while I acknowledge that the threat of researcher biases are ever-present, I still attempted to table my influence during the data collection process by using mostly predesigned, piloted, and amended questions and attempted to reserve my influence for the sense-making process where constructions from my interpretations were appropriate and aligned with my methodology (Merriam & Tisdell, 2016; Paul, 2005).

Interviewer Effects

Interviewer effects might have affected the interviews with SOAR's rebrander and the GEC as both conversations were less structured and deviated from the predetermined protocol; however, in light of qualitative research's emergent design this adjustment is acceptable and was made to gather as much (rich) information as possible to consider during the sense-making process (Merriam & Tisdell, 2016). For clarity, I adjusted my questions for these interviews since the rebrander and GEC felt removed from the classroom and believed that some of the questions might not be applicable. Initially, I made the concession for the rebrander when we spoke on the phone, and she shared that she did not feel well-positioned to answer some of my planned questions. As a result, and in the interest of data, I opted to go ahead with a more conversational approach; an adjustment McMillan (2012) wrote might "enhance the naturalness and relevancy of [participant] responses" (p. 292). With this amendment, I was able to gather a lot of rich information from the rebrander and still covered nearly all the topics embedded in my original interview protocol. Because I found the conversational method effective and since the same rationale applied, I also employed this approach when interviewing the GEC.

Recording Devices

McMillan (2012) wrote that the practice of tape-recording interviews and focus groups is beneficial since it "provide[s] a verbatim record of the answers" (p. 169). McMillan (2012) and Merriam and Tisdell (2016) also wrote that such devices might be problematic since they can make participants feel uncomfortable. Furthermore, recording sessions might lead to socially desirable responses since they make participant answers retrievable. To reduce the aforementioned concerns, I sought verbal permission before introducing the recording device in both in person focus group sessions. I also explained to participants that I would delete the recordings following transcription and agreed to send encrypted files containing double-spaced and line-numbered transcripts to them for review and corrections.

Documents

Merriam and Tisdell (2016) wrote that documents are historically underused in research, that their availability might be limited, that their relevance might be questionable since they were not created for the sake of inquiry, that they might contain biases that researchers are unaware of, and that data obtained from them might not align with data gathered during interviews and focus groups. While the documents shared with me were limited in number, they appeared mutually supportive of one another and provided information relevant to the goals of this study. The documents received are also likely biased either at the macro or micro-level. To the former, district level documents align with the SPS's metanarrative, might be power-laden, and might reflect the preferences of their creators. To the latter, the memo from SPS's Chief Academic Officer (CAO) and GEC to the superintendent might contain individual biases; although, this document's possible biases seem ethical, in the sense of the greater-good, as they are rooted in research-based best practices for the sake of enhancing the G&T program's proportionality of

historically marginalized groups which in turn might help individuals, their communities, and society.

Given recent changes to SPS's G&T policy and practice, future researchers might choose to conduct a discourse analysis to compare and contrast the language that appears on new versus old artifacts.

Credibility, Transferability, Dependability, and Confirmability

To add credence to my work, I asked participants to check and give feedback on transcripts. I also had an academic from a different university review and code my transcripts (Merriam & Tisdell, 2016). After receiving the academic's interpretations of these artifacts, I compared her understandings against mine and was able to confirm my understandings. Relatedly, I asked the academic to proofread this manuscript and to give feedback on anything that seemed amiss to corroborate or contest my interpretations – which she did.

The current study is contextually bound and therefore lacks generalizability which is a non-issue considering that this is a qualitative study and was intended to be context specific (McMillan, 2012; Merriam & Tisdell, 2016). In other words, generalizability gave way to deep, contextual understanding to inform the sense-making process, a tenet of qualitative research (Merriam & Tisdell, 2016). Despite this understanding, this study has a small (n = 14) and likely non-representative sample and as a result I caution potential readers outside SPS against haphazardly transferring my understandings to districts of similar size and context as they might lack merit. Instead, I recommend that interested districts consider my understandings alongside related research in the event their leaders decide to transfer my understandings to their context. As for SPS, I believe that my participants provided good data that district leaders might find useful along with Fellinger et al.'s (2017-a) study when considering the future of the SOAR

program. I also believe that some implications for talent development policy and practice as well as leadership development arose from my investigation and are also worthy of consideration in light of other research. Lastly, I believe that my tentative findings are dependable to an extent due to the use of triangulation, "or cross-validation among different sources and methods of data collection" (McMillan, 2012, p. 303).

Chapter Four: Findings

In this chapter, I present information collected from participant interviews and focus group sessions, document analyses, and Fellinger et al.'s (2017-a) research as it relates to my six research questions (RQs). That said, I divided most of this chapter by RQ and arranged it accordingly. First, I start by restating all of my RQs. Then, I present each RQ followed by a brief introduction to outline the information sources and the contents housed within each segment. Next, I present my data. Afterwards, I succinctly identify emerging themes by RQ. At the end of the chapter, I close with a summary of the prevalent motifs that arose from my research.

Research Questions

1. How do stakeholders (teachers, BLAs, and G&T department members) define:
   a. intelligence,
   b. ability,
   c. creativity,
   d. talent, and
   e. giftedness?

2. How do stakeholders (teachers, BLAs, and G&T department members) respond when asked about G&T and SOAR professional development opportunities?

3. What are stakeholders' (teachers, BLAs, and G&T department members) perceptions of:
   a. the purposes of the G&T program?
   b. the effectiveness of the G&T program?
   c. the value of the G&T program?

4. How do stakeholders (teachers, BLAs, and G&T department members) respond to district trends showing overrepresentation/underrepresentation of students in G&T programs according to social identities such as race/ethnicity and socioeconomic status?

5. What are stakeholders' (teachers, BLAs, and G&T department members) perceptions of:
   a. the purposes of the SOAR?
   b. the effectiveness of the SOAR?
   c. the value of the SOAR?

6. How do stakeholders (teachers, BLAs, and G&T department members) respond to the emerging evidence that:
   a. students in SOAR classrooms are demonstrating higher levels of reasoning and problem-solving abilities than their peers in non-SOAR classrooms?
   b. student participation in the SOAR increases the number of gifted referrals when compared to non-participating students but does not necessarily result in an increase in program eligibility of historically underrepresented populations?

RQ1. How do stakeholders define intelligence, ability, creativity, talent, and giftedness?

The following definitions reflect the perceptions of some Sunnydale Public School (SPS) teachers, Building-Level Administrators (BLAs), and Gifted and Talented (G&T) department members as described during small focus groups, phone interviews, and email correspondence. Additionally, SPS's adopted definition of "Gifted Students" is included under the *Giftedness* subheading in lieu of the term "giftedness" since the district apparently has not defined the latter term but instead defaults to Virginia's revised definition of "Gifted Students." For transparency, I extracted the "Gifted Students" definition from *SPS's 2017-22 Plan for the Education of the Gifted (PFTEOTG)* and present it below as a benchmark to compare participant responses to. After introducing SPS's "Gifted Students" definition, I present information on SPS's G&T screening, identification, and services as extracted from SPS's *PFTEOTG*, SPS's *2017-18 Gifted Education Services* brochure, SPS's *Understanding Your Child's Gifted Education Eligibility Report,* and memo from the division's Chief Academic Officer (CAO) and Gifted Education Coordinator (GEC) to the superintendent. Finally, I identify the common themes that emerged from my data.

Intelligence

Teacher, BLA, and G&T staff participants defined intelligence as a person's capacity to obtain knowledge. Members of the latter groups furthered this definition by stating that intelligence is not only a person's ability to acquire information but also is his or her ability to apply or manipulate it. Teachers often used words like "measurable," "score," and "IQ" when defining intelligence. Only one teacher and the GEC mentioned multiple intelligences (MI). The teacher who referenced MI said that she believes intelligence is dynamic or at least is "to an extent." Similarly, the GEC acknowledged that environmental factors might influence a person's

intelligence and thereby insinuated that intelligence is malleable. The GEC also referred to intelligence as "a [person's] natural propensity" suggesting that he suspects that intelligence is innate.

Ability

All responding participants seemed to agree that ability is a person's potential or capacity to do something, is "what [he or she] can do with what [he or she has]," and is the skill of "connecting new facts and concepts to prior knowledge for integration in their lives." Two teachers said that a person's ability "does not have to align with [his or her] IQ" or even something that he or she is good at but instead is something that he or she feels comfortable with and is willing to try. To this point, one teacher added that she has seen students' abilities far exceed their IQ scores. Additionally, some G&T staff members described ability as: "like a sponge," "what the mind can take in," "dynamic" or "evolving," and the capacity to analyze knowledge and "take it to the next level of manipulation" thereby resulting in a new idea or tangible product. The GEC added that ability "is dependent on the educational environment and effort of the student."

Creativity

Stakeholders collectively defined creativity as "innate," "the ability to think outside the box," and the ability to arrive at unique or novel ideas and/or solutions to a problem. Two teachers mentioned that creativity relates to the arts and the imagination. Alternatively, a G&T department member, after describing creativity, turned to her colleague and said, "Thank goodness I didn't say creativity is being artistic, right?"

Aside from the arts, one teacher argued that creativity differed from intelligence and contended that "there are a lot of creative kids that are not gifted." A different teacher asserted

that creativity "might be pliable" or dynamic. This teacher followed her claim by saying that creativity might be the result of a person's exposure to opportunities and/or experiences.

The GEC supported most participants' descriptions of creativity and expanded on them by claiming that creativity "should [have] a flexible definition that includes anticipating multiple possibilities, utilizing facts and concepts to create something new, providing different perspectives that lead to non-standard solutions to a problem, and even relating to the needs and perspectives of others."

Talent

Participants agreed that talent is innate and manifests in "certain areas where observed achievement or observed potential is easier [and] may surface as personal strengths." BLAs wrote that talents might exist in one or more areas such as the arts, the sciences, or sports. Teacher and G&T department representatives suspect that talent often goes undetected. G&T participants asserted that talent is sometimes "squashed in classrooms" due in part to "restrictive" and "rigid" standards-based practices. G&T contributors also posited that talent is dynamic, that it might be "learned and [/or] built upon," and that we can identify, "foster," and "strengthen" it through talent development programs like SOAR.

Giftedness

All participants identified gifted students as those with talents, exhibiting achievement, or excelling in one or more specific areas in ways that surpass their norm-referenced peers. Teachers said that "thinking and functioning" differently or "thinking outside the box" are signs of giftedness. Some G&T participants claimed that giftedness is innate and that gifted students excel independently with little external input or prompting. The GEC added that giftedness is the "intersection of intelligence, creativity, talent, high ability, motivation, grit, interest, and

socioemotional factors." Some G&T participants argued, similar to their position on talent, that giftedness must be "fostered, encouraged, and stimulated or [that] it will be squashed." Two G&T group members said that they "doubt there will ever be an agreed-upon definition [of giftedness].

SPS's definition of "Gifted Students" appears in its *PFTEOFG* as follows (p. 4):

> The state of Virginia defines "Gifted Students" as those students in public elementary, middle, and secondary schools beginning with kindergarten through twelfth grade who demonstrate high levels of accomplishment or who show the potential for higher levels of accomplishment when compared to others of the same age, experience, or environment. Their aptitudes and potential for accomplishment are so outstanding that they require special programs to meet their educational needs. These students will be identified by professionally qualified persons through the use of multiple criteria as having potential or demonstrated aptitudes in one or more of the following areas:
>
> Specific academic aptitude (SAA)
>
> Such students demonstrate or have the potential to demonstrate superior reasoning; persistent intellectual curiosity; advanced use of language; exceptional problem solving; rapid acquisition and mastery of facts, concepts, and principles; and creative and imaginative expression beyond their age-level peers in selected academic areas that include English, history and social science, mathematics, or science.
>
> Visual or performing arts aptitude (VPA)
>
> Such students demonstrate or have the potential to demonstrate superior creative reasoning and imaginative expression; persistent artistic curiosity; and advanced acquisition and mastery of techniques, perspectives, concepts, and principles beyond their age-level peers in visual or performing arts

Career and technical aptitude (CTA)

> Such students demonstrate or have the potential to demonstrate superior reasoning; persistent technical curiosity; advanced use of technical language; exceptional problem solving; rapid acquisition and mastery of facts, concepts, and principles; and creative and imaginative expression beyond their age-level peers in career and technical fields.

Sunnydale's Gifted and Talented Screening, Identification, and Services

GSS participants shared that SPS only identifies students by SAA and does not identify them based on their general intellectual ability (GIA). One GSS said that she did not know how or if this would change as the district plans to implement a new tool in 2018-19. The GSSs further explained that students in SPS's elementary schools are identified for SAA in English or Math in kindergarten through fourth-grade and can be identified for SAA in all four core subject areas (English, Math, Social Studies, and Science) in fifth-grade and beyond. SPS's comprehensive plan confirmed this information and added that SPS relinquishes screening, referral, and placement for GIA, Visual and Performing Arts Aptitude (VPA) and Career and Technical Aptitude (CTA) to two regional governor's schools. According to SPS's *PFTEOTG,* the governor's schools serve high school students exclusively with one focusing on "government and international studies" and the other targeting "the arts and technology" (p. 2)

SPS's *PFTEOTG* specifies that the "types of data utilized by division staff for screening procedures may include" (p. 8) the following:

> Review of Cognitive Abilities Test results annually at grade three, careful attention should be given to students who are eligible for special education (IEP) and English Language (ESOL) services
>
> Review of Standards of Learning scores at the pass/advanced proficiency level
>
> Review of student performance annually in relevant academic areas addressed by gifted education program services: English, mathematics, science, and/or social studies
>
> Review of other standardized assessments that may be in student's records (IEP, ESOL)

Furthermore, the memo from SPS's CAO and GEC to the district's Superintendent SPS identifies the four criteria the district uses to determine G&T eligibility in a SAA as: "an aptitude test, an achievement test, teacher rating scales, and [student's] grade average." The memo explains that "scores and values from each of [these] four components translate into a certain number of points in a matrix."[16] The CAO and GEC then explain that students who score at or above one hundred points are eligible for school-based gifted (SBG) services while those who score well above this threshold and have high enough grades are eligible for center-based gifted (CBG) services.

SPS's *2017-18 Gifted Education Services Brochure* advises that SBG services are available for students in kindergarten through eighth-grade, that students receiving these services are "cluster-grouped as possible with other identified gifted learners," and that teachers might modify the curriculum in terms of "enrichment and extension, differentiated assignments, increased rigor, and advanced pacing" based on their assessment of student needs. The brochure also advises that SBG students can apply to attend several enrichment programs offered by schools and organizations outside of the district. Similarly, the brochure contains information on CBG services. According to this document, SPS assigns qualifying students in grades three through eight to CBG schools "based on [their] home address" and exposes them to "advanced content, pacing, and instructional strategies which provide even greater rigor and challenge." The CBG part of the brochure concludes with the following statement: "Students must maintain an academic standard to continue participation in the CBG program."

The CAO and GEC carefully explain in their memo to SPS's superintendent that under the district's current G&T screening process there are "a very limited number of alternative

[16] SPS's G&T screening matrix appears on its *Understanding Your Child's Gifted Education Eligibility Report*.

aptitude and achievement measures [to] address any inconsistent test scores, [that] the current rigid identification tool provides no real options for flexibility, and [that] if any one of [the aforementioned measures] is significantly lower than the other three, then eligibility is unlikely." As previously indicated, SPS is planning to make changes to its identification and eligibility processes in 2018-19.

Emerging Themes

SPS's stakeholders' definitions of intelligence, ability, creativity, talent, and giftedness often overlapped. When considering the definitions collectively, they converged suggesting that participants believe we are born with a certain capacity, that we can be smart in different ways (i.e. MI), and that our minds are dynamic, meaning that under the right circumstances we can increase our intelligence, ability, creativity, gifts, and talents. In light of this understanding, I find it both interesting and odd that contributors, often the same individuals, simultaneously believe in fixed ("They can't") and growth ("They can't yet") mindsets since people generally subscribe to one or the other, not both (Dweck, 2012). Previously shared statements highlighting participants' nature and nurture duality include: Intelligence is "a [person's] natural propensity, but is dynamic "to an extent," talent is innate, but can be "learned and[/or] built upon, "fostered," and "strengthened," and giftedness is innate but can be "fostered, encouraged, and stimulated."

RQ2. How Do Stakeholders Respond When Asked About Gifted and Talented and SOAR Professional Development Opportunities?

I begin this section by presenting various references to PD as displayed in *SPS's PFTEOTG*. I chose to include this information for the same reason I included the extracted definition of "Gifted Students" under the first RQ (above) to serve as a benchmark to compare participant responses to. After presenting PD excerpts from the *PFTEOTG*, I share contributors'

views on SPS's G&T and SOAR PD as conferred in small in-person and online focus groups, phone interviews, and emails. Then, I highlight themes that emerged from my data.

Professional Development References in Sunnydale's *2017-22 Plan for the Education of the Gifted*

Part II: Program Goals and Objectives (p. 5-7)

Identification

Goal: Continue to evaluate and revise procedures which increase referrals and eligibility of students from underrepresented populations for gifted education program services.

Objective One: Continue to enhance professional development opportunities and support for schools in the identification and placement of gifted students.

Delivery of Services

Goal Two: Continue to refine and implement a collaborative model which supports educational opportunities for gifted learners served through the School-Based Gifted education program.

Objective Two: Provide professional development opportunities and consultant support for School-Based Gifted Program services.

Goal Three: Continue to refine and implement best practices to support differentiated instruction for students who demonstrate superior abilities in multiple content areas.

Objective One: Provide professional development opportunities and consultant support for Center-Based Gifted Program services

Curriculum and Instruction

Goal One: Provide a continuum of differentiated curricular options, instructional approaches and resource materials which support the unique needs of gifted learners

Objective Two: Continue collaborative work with curriculum specialists to enhance and extend learning for gifted students

Objective Four: Assist teachers with instructional planning and practices for gifted learners

Objective Five: Partner with special education and English Language Learner Staff when necessary

Professional Development

Goal: Provide ongoing professional development opportunities which enhance existing knowledge and skills in the use of research-based best practices in gifted education

Objective One: Continue to provide ongoing professional development

Objective Two: Collaborate with teachers to share instructional strategies based on best-practices in gifted education

Objective Three: Communicate to parents and other stakeholders' practices utilized in identifying and serving gifted students

Objective Four: Provide appropriate professional development to support talent development models such as Inventive Thinking Lab and Project SOAR

Objective Five: Partner with special education and English Language Learner Staff when necessary

Equitable Representation of Students

Goal One: Continue to identify assessment methods which recognize students who will benefit from gifted education program services

Objective Four: Assist teachers with recognition of gifted characteristics to include non-conforming traits

Objective Five: Assist teachers with referrals for possible gifted education

Objective Six: Partner with special education and English Language Learner Staff when necessary for gifted identification and placement

Goal Two: Provide professional development opportunities which focus on cultural competency and non-traditional characteristics of giftedness

Objective One: Continue to utilize the e-learning module to educate professional staff in recognizing the behavioral characteristics of gifted learners among a diverse student population

Objective Two: Provide professional development on instructional strategies for twice-exceptional students

Objective Three: Research additional opportunities to promote cultural competency, increase referral, identification and placement, and support success in gifted education programs among students from underrepresented populations

Objective Four: Utilize Sunnydale's Intranet: SNET to post professional development opportunities and resources for teachers and counselors

Part IX: Professional Development for Teachers of the Gifted (p. 32)

Level I: School Based Gifted

Teachers who provide instruction for cluster groups of gifted students are encouraged to pursue the state endorsement in gifted education.

Teachers of cluster groups in the School Based Gifted Education Program should participate annually in one or more of the following professional development opportunities relevant to gifted learners:

Professional development opportunities provided by Sunnydale Public Schools

Local, state or national seminars or conferences

Level II: Center Based Gifted

Teachers who provide full-time instruction of gifted students in the Center-Based Gifted Education Program are required to obtain the state endorsement in gifted education within five years upon their assignment to the program, which includes four graduate-level courses for the add-on endorsement. These classes should focus on the following topics related to gifted learners:

Identification and characteristics

Instructional strategies

Curriculum

Affective needs of gifted learners

SPS teachers seeking endorsement should work closely with the Office of Licensure to make sure that current requirements are met. Transcripts should be submitted to the Human Resources Department upon completion of each course. Application for endorsement should be submitted promptly upon completion of four courses.

Professional Development Examples

The SPS Gifted Education Department works collaboratively with other departments to provide on-going professional development opportunities open to teachers, counselors, and administrators throughout the district.

Best Practices in Gifted Education

Characteristics and Identification of Underrepresented Populations in Gifted Education

Characteristics and Strategies for Teaching Twice Exceptional Students

Identification and Placement of Gifted Students

Instructional Strategies for Differentiation

Inventive Thinking Lab

Problem-Based Learning

Social and Emotional Needs of Gifted Learners

Gifted and Talented Professional Development

Some teachers reported that they participated in Gifted and Talented (G&T) coursework towards a gifted endorsement on their own. A couple of other teachers said that they had taken G&T classes or attended professional development (PD) sessions in Sunnydale Public Schools (SPS). One teacher revealed that she had not had any G&T professional development because she is afraid and does not see herself as gifted. Another teacher shared that she got most of her G&T training from her last district.

Most building-level administrators (BLAs) wrote that they had not received G&T PD beyond "[SPS's] required [annual] modules for identifying [G&T] students." One BLA added that she held conversations with her staff members about "the differences in bright and gifted students." Another BLA wrote, and his colleagues agreed, that they have "participated in discussions and staff meetings where [SPS's] gifted [support] specialists (GSSs) shared ideas around support for students and for identifying students." One BLA shared that she took a

college course on gifted education through SPS and that she had met with her school's assigned "GSS to learn new things."

Participating GSSs said that there had not been much PD for BLAs. One GSS said that "[they] need BLAs [to be] a part of this, and for [G&T] to be a regular conversation. [BLAs] need to know what they should be seeing in a gifted classroom or a classroom that has a cluster of kids because many times they have no idea. [It is] not [the BLA's] fault; it's just not their background." The GSSs said that they think "a lot of [BLAs] would be very appreciative to have [G&T training]." They also said that they have lots of new BLAs in SPS and that they are hoping that these new leaders will be receptive and will support the G&T program.

The GEC shared that "new to the county" BLAs usually meet with him before the new school year. He said that during these meetings, he gives an "overview of G&T in [SPS]." He also said that beyond this introduction to the G&T program, SPS's administrators do not receive formal G&T PD, but instead receive G&T information through conversations with their assigned GSSs; however, the GEC expects this to change in 2018-19 as the G&T department is planning to meet with assistant principals this summer (2018) to lay the groundwork for "the G&T identification process in [SPSs] elementary schools."

GSSs said that they learned about G&T best-practices (as teachers) through monthly meetings and email exchanges with their assigned consultants, through SPS's workshops, and through "dialoguing with other professionals about different case studies" during their endorsement coursework. They added that since becoming GSSs, they have attended the National Association for Gifted Children's Conference, the Best-Practices Institute at the University of Virginia, and SPS's one-day training opportunities which have addressed topics like creativity and working with teachers in classrooms.

According to the G&T participants, GSSs are responsible for leading a lot of SPS's G&T PD. The GSSs mentioned that most of the training that they are leading centers on supporting gifted students' social and emotional needs, differentiating instruction for gifted students in mixed-ability classrooms, and recognizing typical and atypical characteristics of giftedness. The GSSs recently led a PD session for School-Based Gifted (SBG) middle school teachers who teach Science and Social Studies. They said the purpose of the SBG training was to mitigate between teacher and between school instructional differences and to develop cross-county support, in the form of professional learning community (PLC) groups and an online information forum (housed on Google Classroom). The specialists said that they hope to hold similar sessions with more middle and elementary schools and to expand the training to include English and Math next year but that the ability to do so depends on available funding.

The GEC said that in 2017-18 the GSSs developed a menu of PD sessions that teachers could attend based on their perceived needs and interests. He also shared that the "GSSs met with teachers in grades two through eight in every school to discuss traits of diverse gifted learners." He continued by saying that building schedules sometimes prevented these meetings; therefore, GSSs had to present their information "at the beginning or end of faculty meetings" instead. Moving forward, the GEC said that he is planning a more comprehensive approach to G&T PD that will "focus on impacts on student learning versus a 'smattering' or select window of items that stressed implementation," especially considering the changes to the referral and identification processes recently approved by SPS's school board.

SOAR Professional Development

The G&T participant, who "rebranded" SOAR by implementing the pre-/post-test model, and by creating and introducing the Flight Manual,[17] a workbook full of scripted talent development lessons and activities arranged by skill (i.e. Visual Memory, Auditory Memory, Listening Comprehension, Asking Meaningful Questions, etc.),[18] said that SPS previously offered more SOAR PD. She said that her "team [used to] met with [SOAR] teachers twice during the year; first to teach teachers how to teach [SOAR] lessons and later to gather feedback from the teachers on the lessons and program." She also said that "people are flying fine [since introducing the Flight Manual] and that not as much professional development is necessary [since the] lessons are scripted, and the program is easy to follow."

Likewise, the GEC said that SPS used to offer more SOAR training than it does now. He said that SOAR teachers used to meet "three times a year; in the fall, winter, and spring." He also said that his department changed its approach to SOAR PD from group PD to one-to-one sessions to allow teachers more face time with their students.

Teacher participants reported receiving little SOAR PD. One teacher mentioned that she received a teacher notebook, the SOAR Flight Manual, and participated in a quick walkthrough of the program's scripted lessons. Another teacher said that she partook in a half-day training "on what we're looking for and that type of thing." Additionally, one teacher shared that "she doesn't feel shortchanged" despite limited SOAR PD.

The BLAs did not write about SOAR PD in their responses, but G&T staff members said that BLAs receive information on SOAR informally through one-to-one meetings with their

[17] Prior to the Flight Manual, SPS's G&T department delivered SOAR lessons to participating schools on "half pieces of paper" and teachers had to sort through them.
[18] These skill headings appeared on pages 2, 3, 5 and 7 of SPS's SOAR Flight Manual.

GSSs. The GEC added that he does not think an overarching SOAR PD session for administrators would be as fruitful as the conversations that they have with their GSSs. He also said that he believes the best way administrators can support and understand SOAR is "by observing SOAR lessons and seeing the program in action."

Emerging Themes

Most participants reported receiving G&T PD through SPS workshops, one-to-one sessions with GSSs, and through their independent pursuit of a G&T endorsement. Reviewing transcripts, participants appear to agree that SPS's G&T PD, when available, has mostly addressed G&T instructional strategies and recognizing gifted traits in a variety of learners. Participants also seem to agree that SPS offers limited to very limited G&T PD, especially for BLAs; however, G&T staff participants' perceptions differed from teacher participant's views on this subject in that G&T participants discussed SPS G&T PD for teachers and even cited specific sessions. Similar to G&T PD, teacher participants claimed that they received very little SOAR training.

RQ 3. What are Stakeholders' Perceptions Regarding the Purpose, Effectiveness, and Value of the Gifted and Talented Program?

I begin this section by presenting SPS's philosophy, mission, and vision of its G&T program as found in the division's *PFTEOTG* and *Gifted Education Services Brochure*. As in earlier sections, the philosophy, mission, and vision provide a meta-narrative to compare participant responses to. After presenting the philosophy, mission, and vision, I share participating employees' perceptions on the purpose of SPS's G&T program followed by their views on the effectiveness of the program; however, I do not present values separately as few

appeared and those that did are already part of contributors' beliefs on program effectiveness. Lastly, I highlight themes that emerged from my data.

Sunnydale's Philosophy of Gifted Education

SPS's G&T *Division Philosophy for the Education of the Gifted,* which includes a vision and a mission statement, succinctly summarizes the purposes of SPS's G&T program and appears in the district's comprehensive plan. An abridged version of this philosophy appears on SPS's *Gifted Education Services Brochure.* The excerpt below is from the *PFTEOTG.*

> Division Philosophy for the Education of Gifted Students (p. 3)
>
> Vision
>
> SPS will provide an engaging and relevant education that prepares every student to adapt and thrive in a rapidly changing world.
>
> Mission
>
> Sunnydale Public Schools, in partnership with students, families, and communities, emphasizes and supports high levels of achievement through a global education for all, with options and opportunities to meet the diverse needs and interests of individual students.
>
> As part of the vision and mission of Sunnydale Public Schools, the Gifted Education program recognizes and identifies diverse gifted learners and provides a comprehensive plan that:
>
> Delivers an appropriately differentiated instructional program responsive to student ability and learning needs
>
> Assists students in achieving maximum use of potential to achieve personal success
>
> Provides a continuum of program service options
>
> Addresses the social and emotional needs of diverse gifted students
>
> Supports an educational environment that challenges gifted learners and enables students to perform at levels of excellence
>
> Facilitates the development of self-directed learners

> In accordance with the guidelines established by the Virginia Department of Education, exemplary program standards for gifted learners will be achieved through the collaborative efforts of the school, division, students, parents, and community.

Purpose

Teacher participants shared that the purpose of SPS's G&T program is to "stretch" high-ability students through differentiated (rigorous, compacted, or accelerated) instruction that promotes intelligence, ability, creativity, and talent, and exposes them to activities and materials that advance inquiry, enrich the general curriculum, and encourage self-actualization.

One teacher described her perception and experience with the G&T program as a mother. She said that she feels parents view the program as "elitist" and as a "my kid is better than yours type of thing." She also explained that when her family relocated to the area, a guidance counselor told her that her daughter was "too social" for the program which is why her daughter was denied access to G&T services.

BLA's wrote that SPS's G&T program is supposed to "provide support for [and] develop gifts and talent[s]" in those who are "[gifted] identified" or who show high-ability and talent, and "to increase students' ability to problem solve and be creative and critical thinkers."

The GSSs said that the goals of the G&T program are "to provide appropriate educational opportunities to our students that need something that is beyond the standard curriculum," that is differentiated in ways to enrich, push, and challenge them, that "makes them feel uncomfortable," and that encourages them to "stretch and grow" in areas of strength and weaknesses.

The GEC added that the purposes of the program are "multi-faceted" and that the program is responsible not only for serving identified students but also for "cultivating talent and

identifying students" equitably "from all backgrounds and experiences" particularly in the areas of "critical thinking and creative talent."

Effectiveness

Teacher participants' opinions about the effectiveness of SPS's G&T program ranged from mild to very successful. Their perceptions seemed to hinge on their level of involvement with the program. For instance, the only non-G&T and non-SOAR teacher appeared to think that the G&T program is only successful for those "who want to be there and who want to put forth the effort." She mentioned that some students "don't want the burden of more work because they're identified gifted" and that she has "seen kids not go into the program or get removed [from the program] because of the extra work involved or [because they] don't feel engaged."

Teacher participants who teach SOAR feel that the G&T program is mild to moderately effective and that it works for "a percentage" to "most" of the program's participants. One SOAR teacher shared that she believes that the program helps students succeed in the G&T program because it seals opportunity gaps and prepares them for the rigor and pacing of G&T instruction. Another SOAR teacher claimed that the G&T program is only mildly effective stating that the "bar [is] too low" and that classrooms and curricula are too "restrictive" and "overly focused on testing."

The teacher, who shared her motherly perspective, said that "so many kids who were in [SPS's] G&T program or attended [its] specialty centers and whatnot ended up going to the same college that my kid went to and are working in the same place that my kid is." She believes that SPS's G&T students thrive in grade school but are not excelling or reaching their expected

potential after high school. This participant recommended that SPS consider "beyond school" support for these students to better their chances of achieving self-actualization.

Lastly, the teacher who believes that the G&T program is very successful is a (CBG) teacher. When responding about the program's effectiveness, she gave examples of differentiated instruction for each core subject area. More specifically, she said that "in the fifth-grade CBG program my teammate takes the students through two years of math curricula, minimum, often three, and teaches two years of science curriculum due to deficiencies in recall/lack of appropriate teaching/experiences of fourth-grade content."

The CBG teacher also mentioned that SPS compacts the World Studies curriculum for "deeper understanding" and focuses on "interconnections between geography, history, and culture." She said that "present[ing] [the material] in a compacted format allow[s] students to focus on areas of interest within the required topic area." Similarly, she shared that SPS condenses its CBG English curriculum which allows her instruction "to be accelerated in pace and content, have increased depth and rigor, [and] utilize unique process, product, and assessments." She also mentioned that [in English] her students engage in "a deeper examination of literature through Socratic seminars, thematic examination, and use of higher-level thinking skills.

SPS's SBAs do not feel that the district's G&T program is effective. They believe the program is not challenging enough, that there are not enough opportunities for talent development, and that SPS is not successfully identifying more students (including underrepresented students) for its G&T program. Furthermore, a BLA reported that "the data at [my] school does not show any increase in pass-advance SOL scores" and "[my] visits to classrooms do not showcase student thinking that could be considered in the gifted

realm." Additionally, one BLA said "limited support for G&T" is a barrier to the program's success, said that the GSSs have not been able to provide consistent visits and coaching to teachers since they are also short-staffed, and said it would be helpful if teachers had a menu of G&T lessons or activities that they could choose from. This BLA reasoned that having ready-made lessons would help with program consistency.

GSSs said that the effectiveness of the G&T program depends "on the classroom, the school, and the administrator." They discussed inconsistencies in strategy implementation and student engagement both between classrooms and between schools. One GSS said, "I've been in classrooms where the entire room is full of identified gifted students, and they're not getting exactly what they deserve." She attributes this, at least in part, to "administrative support" and questions "whether [the BLAs] are present enough to recognize that some things are missing." She also shared that "BLAs like having those [CBG] groups in their buildings because of test scores" but feels that they are not invested beyond housing the students. She said that she does not think BLA apathy is intentional, but that "there is so much else that an administrator tends to focus on" and that they tend to fall back on the "well, these kids are going to pass" mentality.

The GEC said that SPS's G&T program is effective "in some ways, such as identifying high-achieving gifted learners" but less effective in other ways like "identifying historically underrepresented populations." He mentioned that he's excited because the district is "making strides" in addressing the latter and said that he finds this progress "exciting." The GEC also believes that most SPS G&T teachers are "effective in meeting [G&T students'] academic needs based on the resources they have at their disposal, [but that] this is heavily dependent on the skills and experience of each teacher and his/her desire to seek out PD." Beyond surface-level effectiveness, he shared that he could not speak to measurable effectiveness because "there is

neither a needs assessment nor an annual survey." He said that his department gathers advice from a host of stakeholders in many ways, including requesting input from various constituents "approximately every five years." He reported that a "diverse gifted focus group" met last year and "provided feedback on curriculum, delivery of services, identification, and professional development and explained that the information gathered at that meeting serves as the "basis for [G&T] reform efforts" that will take place in the coming years.

Emerging Themes

My data suggests that the perceived goal of Sunnydale Public Schools' (SPS's) Gifted and Talented (G&T) program is to provide identified students or non-identified students who show promise differentiated and challenging instruction that exposes, stretches, and enriches them beyond the capabilities of the standard curriculum in hopes of increasing their ability, creativity, talent. As for G&T program effectiveness, participants' beliefs varied and seemed to coincide with their level of involvement with the program. Teacher's opinions of program effectiveness ranged from mild to very effective; building-level administrators (BLAs) do not think the G&T program is effective at all; Gifted Support Specialists (GSSs) believe its effectiveness fluctuates between classrooms and schools and is building, administrator, and teacher dependent, and the Gifted Education Coordinator (GEC), even though there is not a metric to assess growth, said that it is effective in some ways but not in others.

RQ 4. How Do Stakeholders Respond to District Trends Showing Overrepresentation or Underrepresentation of Students in Gifted and Talented Programs According to Social Identities Such as Race/Ethnicity and Socioeconomic Status?

The following information reflects participant perceptions of racial, ethnic, and/or socioeconomic inequities in SPS's G&T program. Contributors shared their opinions in online

and in-person focus groups, over the phone, or via email. Additional data supporting SPS's acknowledgment and plan to rectify G&T disproportionality came from its *PFTEOTG* and a memo from SPS's CAO and GEC to the superintendent. After presenting data from the aforementioned sources, I share common themes that I identified in my data.

Participant Response

All research participants agreed that racial, ethnic, and even socioeconomic disproportionality exists in SPS's G&T program. In fact, their first reactions when asked about overrepresentation and underrepresentation included: "Absolutely!" "Yeah!" "Not surprised." "Totally know it... lived it... still, live it." There are "gross inequities." "I see this at my school," and "we are fighting this at my Title I school." One GSS even claimed that she "can walk into a CBG classroom [and immediately notice] there's not a lot of diversity."

Beyond their initial reactions, some participants gave possible reasons and a few offered solutions for the inequities in SPS's G&T program. These participants said that over-reliance on academics, achievement, and biased assessments, tools, and practices are boundaries for certain student populations. A GSS added that assessment vocabulary is a roadblock to the G&T program for some students. Others commented that some (presumably privileged) parents pressure teachers, schools, and possibly SPS into evaluating and later deeming their children eligible for the G&T program. One participant reasoned that parents "of certain economic groups" might have had "negative educational experiences" when growing up and are unaware of or are apathetic towards the G&T program and/or feel that "getting through [school] is good enough." A different contributor said that unequal representations of certain groups might be "due to lack of exposure to books, varied thinking, and creative play [which leads to] a huge gap in learning." Others believe that teachers only want to refer those who are "smart" and avoid

referring students deemed “discipline problems.” Regardless of the reasons leading to the program’s racial, ethnic, and/or socioeconomic inequities, some participants believe that SPS's G&T department is aware there is a problem and are working to correct it.

Participant recommended solutions to mitigate SPS's G&T program inequities include “expanding our viewpoints and using other types of indicators beyond standardized testing to determine who qualifies [as gifted],” fixing or adopting a new evaluation tool, educating stakeholders on the “influence that trauma, early experience and intervention, and basic nutritional health have on student performance,” and enlightening parents on the G&T program and its services. To the latter, several open houses, including a “Community Night,” have been held to increase stakeholders understanding of SPS’s G&T program and its services. In addition to the aforementioned suggestions, two members of the BLA group wrote that employees need to “recognize that all students have talents,” to “focus on talent development versus skills acquisition” (particularly for those who might have opportunity gaps), and to encourage problem-solving and critical thinking in all students.

As previously mentioned, SPS’s G&T department is aware and is working to enhance the racial, ethnic, and socioeconomic proportionality of its G&T program as evidenced by the divisional goals that appear in the *2017-22 PFTEOTG* comprehensive plan and contents of a memo that SPS’s CAO and GEC sent to the Superintendent on March 13, 2018. Excerpts from both documents are included below.

2017-22 Plan for the Education of the Gifted (p. 5 & 6)

Identification

Goal: Continue to evaluate and revise procedures which increase referrals and eligibility of students from underrepresented populations for gifted education program services.

Delivery of Services

Goal One: Continue to research, develop, and implement opportunities to nurture the potential of students from underrepresented populations through a continuum of gifted education program services.

Equitable Representation of Students

Goal One: Continue to identify assessment methods which recognize students who will benefit from gifted education program services.

Goal Two: Provide professional development opportunities which focus on cultural competency and non-traditional characteristics of giftedness.

March 13, 2018 Memo (p. 1)

Background

"In October, an analysis of state report data over time revealed trends that supported large reforms to gifted education in Sunnydale Public Schools. Even though demographic data over the last thirteen years showed a slight increase in the number of students from traditionally underrepresented populations referred for gifted education services, the makeup of our identified gifted population has not experienced change much beyond that which could be attributed to changes in our total enrollment over time. The evidence clearly shows the need to change our identification process so that we may progress towards demographics of our identified gifted population better reflecting those of our school division as a whole.

In preparation for new screening measures and identification protocols for the 2018-2019 school year, the Office of Gifted Education has piloted two different instruments thus far. The Naglieri Nonverbal Ability Test (NNAT) in three elementary schools provided valuable data and revealed students whose other data did not adequately reflect their potentials; twenty-seven percent of the fifth graders referred for testing solely based on NNAT scores were identified eligible for services. Additionally, first grade teachers in eleven elementary schools recently completed online HOPE Teacher Rating Scales for their entire classes. This research-based qualitative screening tool does not rely on students' computer or test-taking skills that could negatively affect results for young children, and its simple format prevents it from being a time-consuming task for teachers. Data from this tool is currently being shared with participating schools to empower screening committees with data as they review students for possible referral, with outcomes analyzed in late May after eligibility decisions are made.

Emerging Themes

Participants are acutely aware of the racial, ethnic, and socioeconomic disproportionality both in SPS's G&T program and in G&T education at large; contributors spoke of many factors that might lead to over and underrepresentation of certain student populations, and all parties, including the division at large, seem to recognize the need and have offered several recommendations to work toward addressing concerns.

RQ 5. What are Stakeholders' Perceptions About the Purposes, Effectiveness, and Value of SOAR?

I present data associated with this question in four subsections, which are: Purposes, Effectiveness, Value, and Emerging Themes. The data included under these subheadings came from Fellinger et al.'s (2017-a) study, their corresponding executive summary (2017-b), SPS's *PFTEOTG*, and participant interviews and/or focus groups. As in previous sections, I included excerpts from documents for comparative purposes.

Purposes

According to Fellinger et al. (2017-b), SOAR's "purpose is to help teachers expose students to the thinking processes and vocabulary typically used on assessments for gifted evaluation and to recognize potential giftedness in students typically underrepresented in gifted education programs. More specifically, SOAR provides quick, ready-made cognitive exercises to prompt reasoning and problem-solving skills and exposes students to the language and vocabulary found on the Cognitive Abilities Test (CogAT)" (p. 6).

Teacher, BLA, and G&T staff participants confirmed their understanding that the goals of the program are to develop critical thinking skills and creativity in all students through differentiated experiences and to better identify students who have lacked exposure (to

opportunities) for SPS's G&T program. BLAs added that SOAR not only promotes the development of critical thinking and creativity but also requires the application of these skills as well.

One teacher and two G&T department members, including the GEC, said that SOAR's purpose is or was "to prepare [students] for the CogAT test to give those who are 'on the bubble' a better chance of being identified as gifted." The GEC clarified that this did not mean "simply practicing to do better on the test, but to provide experiences for all students to help them learn how to think in different ways." Another G&T department participant and teacher participants added that SOAR prevents students from becoming upset or overwhelmed when facing aptitude tests like the CogAT, allows them to tend to the task at hand, and thereby gives them a better chance of performing at a level commensurate with their ability.

The GEC also said that "SOAR was [is] intended to increase the racial and ethnic proportionality of the G&T program based on research identified best-practices." His view is corroborated by the first goal and its corresponding objective that appear in SPS's *2017-22 PFTEOTG* comprehensive plan as displayed below.

> 2017-22 Plan for the Education of the Gifted (p. 5)
>
> Delivery of Services
>
> Goal One: Continue to research, develop, and implement opportunities to nurture the potential of students from underrepresented populations through a continuum of gifted education program services.
>
> Objective: Continue to implement and support Talent Development Programs such as Inventive Thinking Labs and Project SOAR

Alternatively, one G&T department member contends that "SOAR wasn't created to enhance racial and ethnic proportionality in [SPS's] G&T program," and said that if it is

enhancing the G&T program's equity that it "may be an unintended benefit [of the program] because its exercises help [students] to overcome the first stopgap." This person explained that according to research that teacher referrals are one of the largest barriers to G&T identification. Correspondingly, another G&T department member believes SPS targeted that Title I schools for SOAR to "change the mindset of some of those teachers" so they "see their students in a different light." Teachers reported referring more students in 2017-18 due to their shifting mindsets and G&T staff members feel that increased referrals are due to teachers noticing traits in students that they would not have seen without the program or its exercises. Participants felt this might be because Title I lessons are so scripted that students are not able to recognize, display, or hone their talents and that SOAR affords them the opportunities to do so.

Effectiveness

Fellinger et al.'s (2017-b) study responded to SPS's request for "a refined and improved formal evaluation on the efficacy of the [SOAR] program" (p. 6). Prior to Fellinger and colleagues' (2017-b) investigation, SPS had only conducted a "limited" assessment of the program "at the end of [it's] first year of implementation" (p. 6). Ultimately, Fellinger et al. (2017-b) discovered (with limitations such as low survey response rates and participant bias) that the SOAR program had arguably large pockets of success. More specifically, they found that students' reasoning and problem-solving abilities grew across all ten of the categories assessed by the SOAR pre-/post-test[19], and did so at a rate the researchers deemed positive based on the results of a Pearson *r* correlation that related the pre-test and post-test scores from six classrooms ($R^2 = .2209$) and statistically significant results of a *t*-test ($p < .05$); that SOAR according to a

[19] Pre-/post-test categories included visual memory, auditory memory, listening comprehension, vocabulary, goal-setting, algebraic thinking, word analogies, figure analogies, classification, and logic

Pearson *r* correlation (R^2 = .0357) and an ANOVA ($p < .05$) that compared students' SOAR post-test data to their CogAT scores, SOAR participants scored slightly higher on some parts of the CogAT; although, SOAR high score variability (SD = 24.66-58.5) indicated that the SOAR program did not affect student-growth equally: that pivot tables revealed that SOAR participation might have positively impacted students categorized as White or Two or More Races, but not those classified as Asian, Hispanic, or Black (White Treatment = 54.5 > White Control = 44.10; Two or More Treatment = 76.33 > Two or More Control = 50; Asian Treatment = 49 < Asian Control = 50.5; Hispanic Treatment = 44.38 < Hispanic Control = 54.6; Black Treatment 49.82 < Black Control = 51.76); pivot tables also indicated that students categorized as English Language Learners (ELLs) [ELL Treatment Group = 36.31 < ELL Control Group = 52.35], Students with Disabilities (SWDs) [SWD Treatment Group = 47.75 < SWD Control Group = 60.72], or Economically Disadvantaged [Econ. Dis. Treatment = 49.04 < Econ. Dis. Control = 53.90] performed better on the CogAT if they were not in the SOAR program; that SOAR might not affect teacher perception "of potential giftedness in historically underrepresented populations" (p. 6),[20] and that SOAR participants had a greater chance of being referred for gifted evaluation than non-participants (Overall Students, $p < .05$; Underrepresented Students, $p < .005$; Majority Students, $p = .370$),[21] but were less likely to gain access to SPS's G&T program (Overall Students, $p = .107$; Underrepresented Students, $p = .086$; Majority Students, $p = .965$).

Teacher participants claim that SOAR is effective in enhancing students' thinking skills, increasing gifted referrals, and possibly improving the inequities in SPS's G&T program. They

[20] Fellinger et al. (2017-a) cautiously reported that their teacher participants believe that culturally, linguistically, and economically disadvantaged students (CLED) demonstrate above average abilities in different ways, that they held mixed views on culturally, linguistically, and economically disadvantaged (CLED) students' capacity for advanced academic programs and on curricular modifications for CLED students, and that their views on G&T testing and identification were questionable; however, participants feel that "Lack of personal experiences and background knowledge" (p. 115) served as a barrier to G&T eligibility.

[21] Results are based on data combined data from the 2013-14, 2014-15, and 2015-16 school years.

reported that the program's students think "way beyond the topics presented" and that they have observed and heard teachers talk about how "the makeup of [a CBG teacher's] class is a lot more diverse this year than it has been in the past."[22] One teacher mentioned the need to implement SOAR with fidelity,[23] and another wrote that SOAR "appears effective" based on "the data [she's] been shown about its use in other schools," but clarified that she cannot speak from personal experience because this is the first year that her school has used the program.

Recognizing the lack of a growth measure as a problem, the rebrander developed a pre-/post-test that covers the ten topics that SPS deems most important (see footnote twenty-two (above)). The rebrander said that these assessments are intentionally short because of the students' age, that they include two questions per topic, and that they "can easily tell when scoring post-assessments what skills haven't been taught." This participant continued that "there has been considerable student growth in the areas of reasoning and problem-solving [and that it is] much higher than last year." At the time of the interview, she said that she planned to share student growth data with teachers and administrators by the end of the year. She also mentioned that introducing the Flight Manual has helped with program effectiveness because teachers can not only look at and plan for future lessons but can also reflect on past lessons to see students' growth and performance.

The GEC said that students' post-test performance indicates that the program is effective; although, he "cannot determine a causal link between program participation and student growth." Nevertheless, he said that the pre-/post-test model offers "one way to show [that] students are

[22] The teacher participant who reported that CBG classes appear more diverse said that she is not sure to what degree, if any, that SOAR is responsible for this change.
[23] Participants reported that SOAR lessons are typically ten to fifteen minutes long, some are less; that review weeks are built into the program and allow students and teachers to "catch up" when necessary, and that the lessons are scripted and easy to follow.

growing." He also mentioned that his department collects survey data from teachers on the overall program, what went well, and areas for improvement, but did not share any insight on teachers' responses to the survey.

Two gifted and talented (G&T) department members and one teacher (previously mentioned) said that SOAR is effective when "implemented with fidelity." They confirmed that the program's lessons are "scripted, are "very easy to follow," and G&T participants said that teachers need to and follow the Flight Manual faithfully. G&T contributors said that SOAR program devotion, like G&T, depends on the teacher, the school, and the administration and suspect that the master schedule affects SOAR implementation because the program is "not as effective when viewed as separate or extra." To this point, they said that teachers are reluctant to implement SOAR when it is not part of the master schedule because they fear being penalized during observations for deviating from their school's agenda. Both the teacher and G&T participants said that there are a lot of "competing factors" or "non-negotiables" that result in limited time which presents a "huge hurdle to [SOAR's] effectiveness."

Building-level administrators (BLAs) wrote that "if [SOAR's] goal is to identify more students [for G&T] that its ineffective, that teachers "have asked for years not to do it," that teachers feel like "students need [too] much support and become frustrated easily when completing [SOAR] lessons," and that "if academic growth is to be expected then academic data does not support the use of SOAR." BLA's also raised concern about limited support for teachers and wrote that the Gifted Support Specialists (GSSs) are "only able to visit or coach sporadically." Alternatively, one BLA noted that the "SOAR pre-/post-test data demonstrates its effectiveness," but that she would like to see longitudinal data from "identified measures" (including correlations with students' scores on the Standards of Learning (SOL) assessments

and Scholastic Aptitude Tests (SATs)) to support a "generalization of [the] skills" gleaned from the program.

Value

Some teachers reported that they referred more students for G&T evaluation since participating in SOAR. These teachers believe that increased referrals might be attributed to heightened awareness of G&T traits and because SOAR lessons allow students to discover, develop, and show their gifts and talents differently than they can in the regular, restrictive curriculum. One teacher mentioned that SOAR also provides more evidence, beyond grades, that teachers can consider when referring students for G&T evaluation. A different teacher said that she believes SOAR provides future CBG students a solid foundation as it prepares them for the pacing and rigor they will face in that program.

Beyond the promise that SOAR might provide the G&T program, teachers like that it exposes students to experiences that they might not have had before, that it builds their capacity to think for themselves, that it "increases resiliency and tenacity in accomplishing difficult tasks," and that it "makes learning relevant" by helping students make real-world connections. Teachers claim that SOAR benefits "all [students] because of [its] cross-curricular connections, its collaborative nature, and its ability to enhance students critical thinking skills." Some teachers added that SOAR provides students a safe space to experiment since the lessons are not graded. One teacher further praised the program by saying that SOAR teachers are "not teaching [students] the answers like A, B, C;" instead, they are teaching them that there is "no one right answer," that this mindset is giving students "an outlet and a way to rethink," and that it is producing stronger students. Another teacher said that she is "finding that some of [her] children who are struggling with other things are starting to pick up what [they're] doing in SOAR and

being able to apply it to other things and [that SOAR is] making them stronger students." Several teachers confirmed that they have seen students recall and apply SOAR skills to the regular curriculum at later points in time.

Several teacher participants fear that SOAR is going away. For instance, one said: "Please don't go anywhere with [SOAR] …don't take it away because I really think my children, and it doesn't matter whether they're the lowest or not, are thinking in a different manner." A couple of teachers said that they "really believe in the program" and if the program goes away, that they would like to maintain access to the materials so they could continue SOAR lessons with future students. Teachers also expressed their affinity for the program by saying that they would like to teach SOAR lessons to their (biological) children and/or with their students at different grade levels. Only one teacher said that her colleagues do not value SOAR equally. She shared that this is because some see it as "just one more thing [to do]."

G&T participant responses reinforced some teachers' views on SOAR. For example, G&T staff members emphasized that "SOAR's about exposure," and discussed how "promoting different ways of thinking, particularly in those who have opportunity gaps" might impact other content areas such as reading and math. Two G&T members reported that as teachers, they "stole" SOAR lessons, adapted them, and taught them to students who were not in second-grade simply because they saw the value of the lessons. Similarly, G&T participants reported that teachers have asked them "Why is [SOAR] just in second-grade?" and followed up with comments like, "Because my little girl is in fifth grade and she could really benefit from doing some of these activities." G&T members also said that they have had students approach them and ask "Are we doing SOAR with you today?" They also mentioned that students "want to share what they're learning and what they've done" and said, "that says a lot."

As for SOAR's future, all G&T department participants said that they want to expand the program, not take it away. They also said that expansion depends on funding and their department's ability to provide sufficient training and support to those schools wanting the program.

Two BLAs wrote that they do not see the value of SOAR and that they plan to stop using it in 2018-19; a position that corroborates one G&T participant's belief that "BLAs might not place priority on the program." The G&T participant continued by explaining its "because [BLA's are] unaware of the program." She also said that administrators "typically visit classes during core curriculum time and haven't [actually] seen SOAR lessons." She said that she hoped that the post-test data that she from the 2017-18 school year would give BLAs evidence of the program's worth and would enhance their support for the program.

Emerging Themes

Most participants seemed to agree that the purposes of SOAR are to develop all students' critical thinking and creativity skills through differentiated experiences; to identify students from historically underrepresented populations for SPS's G&T program, and to prepare students for the CogAT.

Dissension arose between participant groups about SOAR's effectiveness and the future of the program. More specifically, BLAs seem to think SOAR is ineffective and some wrote that they plan to stop using the program in 2018-19. Teachers and G&T staff members, on the other hand reported that SOAR is beneficial for all students and claim that pre-/post-test data shows that the program enhances students' thinking skills and resultingly gifted referrals when implemented with fidelity. Some participants also said that SOAR is more effective when teachers view it as connected to the regular curriculum and not as an add-on.

RQ 6. How Do Stakeholders Respond to the Emerging Evidence that:

a) Students in SOAR Classrooms are Demonstrating Higher Levels of Reasoning and Problem-Solving Abilities Than Their Peers in Non-SOAR Classrooms?

b) Student Participation in SOAR Increases the Number of Gifted Referrals When Compared to Non-Participating Students but Does Not Necessarily Result in an Increase in Program Eligibility of Historically Underrepresented Populations?

As written in the "Effectiveness" (of SOAR) section that appears under RQ five, Fellinger et al.'s (2017-a) study revealed that SPS's SOAR program enhanced students' reasoning and problem-solving abilities and the number of students referred for gifted evaluation; however, SOAR did not enhance the equitability of the G&T program in terms of historically underrepresented populations. Since Fellinger et al.'s (2017-a) findings served as the basis for this RQ and because I am specifically concerned with participant responses, contributors served as my sole data source to answer this RQ. Participant data appears below for the three components of this RQ which I follow with the emerging themes identified in the data.

Enhanced Problem-Solving and Reasoning Abilities

Teacher participants' reactions to the claim that SOAR enhanced students' problem-solving and reasoning abilities ranged from confident to hopeful. Most teachers responded by saying things like: "Absolutely!" "Not Surprised." "[I] know it to be true." and "This matches the information that I have received from reputable sources." However, two teachers seemed to think that students might not have experienced such gains yet but hope and believe that they will in time. One of these teachers said that she believes gains "will improve if the program is used more consistently."

BLAs wrote that they "Would be pleased," "Would be very excited," and "Would love to hear this." They also wrote "I wonder if other skills are also increasing?" "I would want to explore this more." And "We are not seeing it."

Some G&T participants responded excitedly with words and phrases like "Not surprised." "Good!" "That's what we want! "That's the expectation." While other members of this group reacted in a more sober and calculated manner with comments like "[My] gut says yes, but we haven't analyzed this data," "I'd want to see the control group data, methodology, and "I'd want to know that the results are valid." The GEC said that if the results are valid, then they could serve as an impetus for expanding the program to other schools."

Increased Referrals for Gifted and Talented Evaluation

Again, teacher responses ranged from hopeful to confident. One teacher said "[I] would hope that would be the case," but "[we might not see] the turnaround as quickly as [we] would like to. [However, some might be identified later [than third-grade] because] statistically [the] fourth and fifth-grade[s] [have] more CBG students than third-grade. [Regardless], I'll be surprised if you don't see some increase." Her colleague said "Yeah, I totally agree… I definitely referred more people, so I can't imagine…" Two other teachers said "I know that to be true" and "This matches the information I have received from reputable sources." A third teacher said that she believes that SOAR has increased teacher referrals and that she suspects that parent referrals would also rise if SPS educated them more on the program and what traits to look for.

At first, the BLAs seemed hopeful that SOAR might positively affect G&T referrals, but their negativity quickly trumped signs of optimism. For example, administrators seemed hopeful when they wrote comments like "I would be very excited by this, particularly if there were more

referrals for students from underrepresented populations," and "that [this] would be a good indicator of the success of SOAR." However, their hope seemed to wane with questions about referral validity and typed statements like "Our [SOAR] teachers referred twenty-six students and none were identified. The teachers are frustrated that the results look like this year after year."

Two G&T participants said that increased referrals would not surprise them because "[students are] given the opportunity to show some more of those classic traits that people associate with gifted students" and because they reminded teachers to check pre-test scores "as the referral deadline approached" not as a need to refer but so teachers could revisit the data and see who might "already [be] exhibiting some of those thinking skills."

The GEC added that "After reviewing the data [assuming it is valid], I would want to expand the program to other schools where administrators are interested and supportive; however, I would need to consider the ability to provide sufficient support."

No Increase in Gifted Program Eligibility for Underrepresented Populations

One teacher participant said she "would be perplexed" if more students were not found eligible based on what she sees in her classroom. Other teachers said that they are not surprised that historically underrepresented students continue to be found ineligible because "referring more [students] doesn't mean that more are gifted. [It] just [means] that we're trying to identify more [as gifted] …like we might be seeing something, but it might not be gifted." Additionally, one teacher said gifted ineligibility might be due to archaic assessments, two teachers said it might be because of parents' reluctance to sign gifted paperwork (because they believe "it [means] more work for [them]"), and one teacher said that eligibility might be affected by "fidelity [of implementation]" or lack thereof.

Similarly, BLAs are not surprised that SOAR participation has failed to increase the likelihood of historically underrepresented students being found gifted. One administrator suggested that SPS review referrals for gifted evaluation to determine if referrers "are looking beyond the typical academic achiever." Another building leader wrote that "we all need a deeper understanding of giftedness versus compliance," and that teachers "need better strategies to identify students from underrepresented populations."

One G&T participant said that she has not run the numbers, but that such a finding "wouldn't rock her world." She said that she would like to see an uptick in underrepresented populations' found eligibility, but there are "too many variables [to determine causality]." She also reiterated that "[enhancing proportionality of underrepresented populations in the G&T program is] not the purpose of [SOAR]."

Other G&T participants agreed with teacher and BLAs beliefs that the number of referrals would not necessarily correlate with found eligibility. Nevertheless, the GEC said it is exciting that conversations about certain kids are taking place that would not take place without SOAR. Also, like teachers and BLAs, some G&T participants believe that the current tool prevents some students from being found eligible and would like to compare this year's results to next year's data after implementing the new tool.

Emerging Themes

Some teacher and G&T participants feel confident that SOAR increases students' problem solving and reasoning abilities. Other members of these groups expressed excitement but remained cautiously optimistic and cited the need to validate these findings or to run their own data analyses. BLAs also noted that the idea that SOAR increased students' problem solving and reasoning skills is exciting but remain speculative.

Teachers and some G&T participants said they are "not surprised" that SOAR increased students' referrals for G&T evaluation. BLAs and the GEC, on the other hand, liked the idea but questioned the validity of teacher referrals and data.

Participants from all three groups agreed that increased referrals should not result in increased eligibility; therefore, they found this news unsurprising.

Summary

Taken together, it appears that research participants believe people are born with innate abilities and intellectual capacities, that people are smart and show their aptitude in different ways, and that our minds can evolve if nurtured. Participants also seem to believe that SPS's G&T and SOAR PD is lacking, particularly for administrators; although, some contributors claim that extensive SOAR PD is not necessary due to the program's highly scripted nature. Additionally, participant responses imply that purpose of SPS's G&T program is to give its G&T students and others of high-ability differentiated and rigorous instruction that not only exposes them to supplementary material but also pushes them to enhance their ability, talent, and creativity. Participants also expressed that the purpose of SOAR is to develop higher-order thinking and creativity in all students, to increase the racial, ethnic, and socioeconomic equitability of its G&T program, and to prepare students for the CogAT. Regarding G&T disproportionality, participants reported an acute awareness of overrepresentation and underrepresentation of certain populations in SPS's G&T program and trust that SPS is working to address the disparities. As for SOAR, teacher and G&T participants suspect that SOAR benefits all students in terms of problem-solving and reasoning skills; although, participants in these groups were not surprised that SOAR increased the number of referrals for G&T

evaluation. Similarly, none of the participant groups, BLAs included, were surprised that SOAR participation failed to increase the number of students deemed eligible for the G&T program.

Participants also commonly cited perceived barriers to G&T education, which included: G&T assessments and eligibility tools, students' lack of exposure/opportunity gaps, and teacher referrals or lack thereof. Other concerns that seemed to transcend several if not all the responses to my RQs included SOAR and G&T program fidelity between classrooms and between schools, and parents' lack of knowledge on these programs.

Lastly, while several participants recommended changes to SPS's SOAR and G&T programs, I did not present all of them here as tentative findings but instead considered their suggestions and included them as part of my discussion in Chapter Five.

Chapter Five: Discussion and Conclusions

This study aimed to understand teacher, building-level administrator (BLA), and gifted and talented (G&T) staff members' perceptions of Sunnydale Public School's (SPS's) SOAR program. It also expands Fellinger et al.'s (2017-a) work which was the first and only evaluative research on SOAR to date. More specifically, this study responds to Fellinger and colleague's call to explore SOAR qualitatively, fills a void due to their low and potentially biased survey response rates, and adds understanding to their otherwise quantitative analyses. In addition, this investigation sought to capture a wider-variety of perspectives by involving more participants, including those who hold different job titles within the division. Furthermore, despite its limitations, this study's findings lead to additional implications that might be considered alongside other research in the future to inform talent development (TD) policy and practice and leadership development programs.

Overview of Findings, Commendations, Recommendations, Contributions, and Future Research

Some participants shared that intelligence, gifts, and talents are inborn qualities and that people have predetermined thresholds for each; they shared that Multiple Intelligences (MI) exist and that the brain is malleable, at least to the extent of predefined capacities - a combination that I find interesting since people typically subscribe to a fixed or growth mindset, not both (Dweck, 2012). In addition, most participants seemed to hold similar views about the purposes of SPS's G&T and SOAR programs when considered collectively; however, discrepancies arose when considering their individual responses; a topic I later discuss under the Vison and Mission of

SOAR and Sunnydale's Gifted and Talented Program subheading. Contributors from all three participant groups (teachers, BLAs, and G&T staff) also mentioned that G&T and SOAR professional development (PD) is lacking, cited a need for additional training in these areas, recognized that racial and ethnic disproportionality exists in SPS's G&T program, and acknowledged that the district is working towards resolving the issue of G&T over/underrepresentation.

Teacher and G&T employee participants reported that the SOAR benefits all students. Members of both groups expressed a desire to continue using the program. G&T staff members shared that they want to see SOAR expanded to additional grade levels and to more schools. Some teacher contributors shared that SOAR mitigates aptitude test anxiety and increases the chance of revealing students' true abilities due to early exposure to CogAT-style vocabulary and questions. On one hand, if this is why Fellinger et al.'s (2017-a) results revealed an increase in G&T referrals, then it seems that SOAR instruction might hold implications for reducing opportunity gaps thereby giving more students an equitable chance of being referred for G&T evaluation. On the other hand, teachers could have theoretically referred additional students for socially desirable reasons like not being labeled as racist or nonconformists. The threat of socially desirable practices brings into question the legitimacy of the referrals and the mechanisms leading to more referrals– concerns which could serve as stepping stones for future, presumably macro and micro-level organizational research that might investigate things like who is referring more students, the diversity of the students they are referring, and students' success rate in terms of found eligibility (Nicholson-Crotty, Grissom, Nicholson-Crotty, and Redding, 2016).

Alternative to teacher and G&T staff contributors, BLA participants wrote that they do not view SOAR as beneficial, that the data they have reviewed does not support the continued use of the program, and two leaders wrote that they are ready to stop using SOAR in their schools immediately.[24] Before writing SOAR off, SPS's BLAs would be wise to consider factors like fidelity of implementation, variables impeding fidelity of implementation (i.e. time in the master schedule and evaluation indicators), teachers' ability or capacity to correctly identify G&T traits in all students, SPS's G&T eligibility processes and procedures, and recent changes to the district's G&T eligibility processes and procedures as all of these things might affect found eligibility and perceived effectiveness. That said, it will be interesting to see how SPS's G&T referral and eligibility data changes in the coming years given the recent adjustments to the district's G&T program's evaluation criteria and assessments. For transparency, I believe that one of the biggest reasons that more referrals have not resulted in increases in found eligibility involves a disconnect between the district's G&T purposes and goals and its former G&T criteria and assessments. I also trust that SPS shares this belief based on the memo from the Chief Academic Officer (CAO) and GEC to the superintendent - which seems to have helped initiate changes like the reweighting of G&T criteria and the addition of evaluation metrics like the NNAT and curriculum-based assessments (CBAs). Further, I believe these changes in criteria and assessments better align with SOAR's goals and should result in increases in found eligibility in historically underrepresented populations. However, in the meantime, some teacher participants seem acutely aware of their BLAs' current position on SOAR and reported that if it "goes away" that they would request SOAR materials so they can use the intervention with future students despite its potential cut as a formal program. Several teacher participants

[24] An amount of autonomy that I, based on my experience, cannot fathom having as a BLA.

also mentioned wanting to provide SOAR instruction to their own children at home. Teachers' plans to continue using SOAR materials with future students, even if the program is abandoned by their principals, and their desire to use these materials with their own children serve as a testament to their faith in the SOAR program.

Like SOAR, participants hold mixed views on the value of SPS's G&T program. They seemed unsurprised and even cautiously hopeful to hear that SOAR enhanced students' problem-solving and reasoning skills and increased G&T referrals (Fellinger et al., 2017-a). They also seemed unphased when hearing that SOAR participation did not increase the number of underrepresented students found eligible for G&T services; although, some said that the potential is there. Based on the work of several researchers (i.e. Dai, 2017; Gyarmathy & Senior, 2016; Olszewski-Kubilius & Thomson, 2015), I believe shorter lengths of time might impede found eligibility for some SOAR students; that the TD process likely takes more than one year – especially for those who have opportunity gaps. The former brings me back to an earlier point: Expand SOAR to other grade levels and hold another round of division-wide evaluations for G&T at some point beyond third grade. To the latter, I believe that introducing a second round of districtwide G&T evaluations in middle school would serve a few purposes. First, it would allow students more time to close opportunity gaps. Second, it would allow for late bloomers' gifts and talents to manifest and for the district to identify them. And third, it would allow the district to identify and possibly remove students who were falsely identified from the program in the first place. In my experience as a G&T art teacher, I often noticed that students who were deemed gifted because they were *good lesson learners* (Renzulli, 2012) and thrived on repetitive cookie cutter lessons often plateaued around seventh grade, struggled with advanced concepts and processes, and remained in their comfort zone as they feared failing or being exposed as

fraudulent. A reevaluation at the middle school level would give SPS the objective data needed to support students' continuation or transition out of the program, should be early enough in late bloomers' school careers that they could still benefit from the goals of the G&T program, and should help thwart aggressive parents' power.

Additional Commendations and Recommendations

First and foremost, I commend SPS for its commitment to enhancing opportunity access for students and for establishing the SOAR program which might (intentionally or unintentionally) enhance equitability for those who have been marginalized in the past (Fellinger et al., 2017-b); however, I am concerned that assimilating students to a test to increase their likelihood of program entry is a temporary fix that works within the confines of G&T education's longstanding, flawed structure and fails to address the larger issue of institutionalized racism. To this point, I trust that a shift away from G&T tracking to talent development programming that allows all students to achieve personalized self-actualization is warranted; however, based on my leadership experience, I recognize that such a move would likely cause upheaval which districts are unwilling to face; however, on the off chance leaders are willing to assume such a risk – I would recommend a slow, calculated approach that is jointly developed by a variety of diverse stakeholders, to mitigate issues of power and to increase stakeholder buy-in, and that is comprehensively planned and strategically rolled-out over an extended period of time (Glickman, Gordon, Ross-Gordon, 2009).

Testing

Collecting, Monitoring, and Comparing Assessment Data

I commend SPS for recognizing that in thirteen years, the racial and ethnic representativeness of its G&T program had only increased marginally and for responding by

recently broadening the criteria and assessments it uses to determine G&T eligibility. However, in light of the new criteria and assessments, I recommend that the district formally collect, assess, and compare macro and micro-level existing data to future data using quantitative methods (Nicholson-Crotty et al., 2016). Using quantitative analyses would allow SPS to determine if its newly adopted G&T assessments are enhancing the G&T program's racial and ethnic proportionality (McMillan, 2012) and using both macro and micro-level data would allow SPS to explore the effects of specific mechanisms thereby allowing district leaders to make more targeted and effective decisions (Nicholson-Crotty et al., 2016). Additionally, SPS should continue to collect and review qualitative data from a variety of stakeholders so district leaders can better understand quantitative findings before engaging in future decision-making processes (McMillan, 2012).

Intelligence Quotient and Aptitude Tests

Many researchers (i.e. Callahan, 2005; Elhoweris et al., 2005; Ford & Grantham, 2003; Ford & King, 2014; Ford et al., 2008; Mansfield, 2016; Peters & Engerrand, 2016) have identified IQ and aptitude tests as roadblocks for certain populations attempting to access G&T education. According to the literature, this is partially because these types of assessments were normed long ago using a White-Middle Class population thereby rendering them inadequate for certain, now more prominent, populations and presenting language barriers for others (Peters & Engerrand, 2016). Similar to the literature, participants indicated that over-reliance on academics, achievement, and biased assessments, tools, and practices are blockades for certain student subgroups. Because local and national demographics are evolving, trusting that all people, regardless of their race or ethnicity, deserve educational opportunities that promote self-actualization, understanding that IQ and aptitude tests are still a part of SPS's G&T evaluation

process, and recognizing that racial and ethnic disproportionality exists among SPS's G&T students, I join Fellinger et al. (2017-b) in recommending that SPS norm intelligence tests locally and accommodate any language needs to help reduce barriers and increase assessment equitability for students belonging to historically marginalized groups (Fellinger et al., 2017-b; Peters & Engerrand, 2016).

Curriculum-Based Assessments

While SPS's recent inclusion of Curriculum-Based Assessments (CBAs) as part of the evaluation process is admirable (Callahan, 2005), it is important that they are both reliable and valid (Mandleman et al., 2010); therefore, I recommend that teachers or BLAs vet and refine CBAs for consistency and quality purposes if they have not done so already. As a BLA, I spent a considerable amount of time helping teachers to develop reliable assessments that we could confidently base instructional decisions on. More specifically, I was trained, and I trained my teachers, to select questions for assessments that align with Virginia's SOLs in terms of content and cognitive level (as specified in Bloom's Taxonomy Revised) as well as from both the PowerSchool database and SOL released tests. We also worked to create departmental assessments, administer them to students, and discuss test questions, prompts, and student responses with department members to determine assessment quality. In addition, I recommended that teachers develop performance-based assessments using McTighe's Quality Assessment Rubric (McTighe, 2016), administer them, and use student products, including a four corners activity, to establish inter-rater reliability before advancing to rubric development (McTighe, 2016). For clarity, the four corners exercise requires four teachers to fold four corners of a paper backwards making four small tabs under which each respondent writes an "H," an "M," or an "L," signifying that they believe the student's work is of high, medium, or

low quality in light of the project's criteria. Assuming all four teachers agree on the quality of response, the teachers would then compile a list of the qualities that made the response good, average, or deficient. If the teachers did not agree on the quality of the response, then the assessment would be revised. If they did agree on the quality of the response, then they used the identified qualities to create a rubric for future assessment. My point here is that CBAs need to be reliable and valid for sound referral and evaluation practices. Further, assessments need to be of similar quality to ensure that all adjudicators are comparing apples to apples to ensure that all program participants are afforded equal opportunities for program access and to yield sound data for program evaluation purposes.

SOAR Pre-test/Post-test Reliability

During my investigation, the rebrander shared that the SOAR pre-/post-test contains two items per skill assessed due to concerns about length given the age of the students tested. While I appreciate this rationale, it runs counter to my understandings as a researcher and as a professional educator. More specifically, I understand that "reliability is the extent to which participant and or rater scores are free from error" (McMillan, 2012, p. 137). That said, I am concerned that only having two items per skill on the SOAR pre-/post-test might result in either a Type I or Type II error, a false positive or negative, seeing as students could either get one or both questions correct or incorrect by chance (McMillan, 2012). Either way, I fear that the threat of error might inflate or deflate SOAR students' scores on the pre-/post-test and jeopardize reliability and subsequently validity (McMillan, 2012). Therefore, bearing in mind concerns over length, I recommend adding one item per skill assessed to the pre-/post-test as doing so would only add ten questions to the measure which should not only enhance reliability and possibly validity but also would keep the assessment short and would yield better data that could

be analyzed and used not only for program evaluation but also to inform policy and practice. (McMillan, 2012; Wells & Wollack, 2003).

Needs Assessment

I find it alarming that SPS does not have a method in place to assess the measurable effectiveness of its G&T program but instead arbitrarily bases decisions on anecdotal evidence "approximately every five years." My concern is that without measurable, quantitative data, SPS can neither determine causal relationships between the G&T program and its outcomes nor can district leaders pinpoint where changes are needed (McMillan, 2012). Therefore, I recommend that SPS's G&T department develop or adopt and implement a previously vetted, reliable quantitative tool to measure its G&T program's effectiveness and that can be used in concert with the current qualitative approach.

SOAR Data

Given BLA participants' apparent disrespect for the SOAR program, there seems to be a need for the G&T staff to gather and analyze SOAR data and to find a better and presumably more effective way of sharing their findings with BLAs in hopes of enhancing their support for the program; otherwise, BLAs might elect to discontinue SOAR at their school. Some BLAs reported that data analyses that correlate SOAR pre-/post-test scores with students' Standards of Learning (SOL) and Scholastic Aptitude Test (SAT) performance, that correlate SOAR participation with G&T eligibility (to include type (i.e. English only, math only, or both), that examine G&T eligibility by school (i.e. SOAR versus non-SOAR), and that correlate SOAR participation with G&T success would appeal to them. Again, I advise against BLAs injudiciously abandoning SOAR and recommend that they consider and control for extraneous and confounding variables where possible (i.e. master scheduling and evaluation forms) and

continue to review SOAR and G&T data now that new eligibility criteria and processes have been implemented before determining the programs worth.

Vision and Mission of SOAR and Sunnydale's Gifted and Talented Program

I commend SPS for having an overarching purpose for its G&T and SOAR programs and for providing continuity by subscribing to the state's definition of giftedness (Carman, 2013; Ford & King, 2014; Mansfield, 2016; NAGC, 2016; Peters & Engerrand, 2016), although I noticed that despite having a districtwide goal for its G&T program - that participant perceptions of the programs' purpose varied and were only comprehensive (capturing most of the contents of the G&T mission, vision, and goals) when considered collectively. Contributors also seemed to hold discrepant views on the topics of rigor and excellence as evidenced by claims that the "bar is too low" (which might signify deficit thinking) and that students are not achieving expected levels of success after high school. One teacher participant also shared that the G&T program is only successful for those who are willing to take on the burden of more, potentially unnecessary work. This participant claimed that she knew students who purposefully underperformed or had their parents remove them from the program to avoid having to do extra work. If accurate, this participants' claim is concerning since the burden of inflated and irrelevant work runs counter to the vision of SPS's G&T program, which is to provide an "Engaging and relevant education that prepares students to adapt and thrive in a rapidly changing world." Furthermore, busy work is not beneficial, not supported by research, and as the participant suggested, might lead to apathy. In short, if this participant's perception reflects actual practice, then there seems to be a disconnect between program intent and teacher interpretation and implementation. Such a disconnect holds implications for performance data, perceptions of the program, and most importantly students – all of which can and should inform policy and practice; therefore, I

recommend that the district explore this potential discrepancy and respond promptly, if necessary.

I also noticed dissension between the rebrander and GEC's understandings on the purpose of SOAR, particularly when it came to their positions on SOAR enhancing the racial and ethnic proportionality of the G&T program which indicates that they might be heading in different directions.

Taken together, deviations on purpose and definition are concerning when considering Renzulli's (2012) assertion that a unanimous purpose and definition should theoretically underpin the decisions and policies that guide professional practice to help "avoid randomness in the goals we pursue" (p. 150) and Fellinger et al.'s (2017-a) claim that "The failure to conclusively define giftedness continues to inhibit individual school systems from adequately identifying all potential[ly] gifted and talented students" (p. 57). Both Renzulli (2012) and Fellinger et al.'s (2017-a) positions, coupled with Renzulli's (2012) "Rudder and Compass" theory, lead me to recommend that SPS take steps to ensure a common understanding of its adopted definition and goals for G&T and SOAR. To this point, districts should establish common understandings using a shared decision-making model (Glickman, Gordon, & Ross-Gordon, 2009) that involves various and diverse stakeholders to try and mitigate power issues, particularly since the idea of giftedness is context specific, socially constructed, and value-laden (Renzulli, 1978 via Ayers and Seward, 2016), and to increase constituent buy-in and commitment (Glickman, Gordon, & Ross-Gordon, 2009). Then, once developed, the agreed upon collective understandings should be promoted through regular and ongoing PD and by including the programs' mission and vision online and on a wide variety of relevant paperwork so that it is seen regularly and understood consistently.

Regarding SPS's adopted definition of giftedness, I wonder if Virginia's version, which addresses general intellectual aptitude, specific academic aptitude, career and technical aptitude, and visual and performing arts aptitude and seems to align with Marland's (1972) definition, is most appropriate when considering SPS's diversity and proportionality goals. In light of this concern, I believe that SPS should consider adopting either the 1978 or the 1993 federal definition of giftedness since both address race and socioeconomic status (SES) as barriers to gifted and talented (G&T), promote the consideration of experiences and environment as part of the nomination and adjudication processes (Ford & King, 2014), reference talent development (TD), acknowledge that giftedness transcends socioeconomic groups (Ford & Grantham, 2003) since these definitions seem to better align with Sunnydale Public Schools' (SPS's) needs and wants for its SOAR and G&T programs.

Student Support

Socioemotional

While only discussed by a few participants, SPS appears to offer some degree of socioemotional support for G&T students, as published in documents like the Program for the Education of the Gifted (*PFTEOTG)* (i.e. mission statement, goals, and objectives) and the *Gifted Education Services Brochure*, for high-ability students (Callahan, 2005). While specific descriptions of what SPS's socioemotional support looks like or how it is operationalized are not available, I commend the district for recognizing the need to address it, particularly since it can help compensate for phenomena like negative peer pressure (Ford et al., 2008) and trauma (as shared by a teacher participant) that might lead to underachievement. As a researcher, educator, and parent, I am interested in additional information on how socioemotional support is provided

in different districts; therefore, I trust that a greater degree of transparency on related services would be appreciated by district stakeholders at a variety of levels.

Post-High School

One teacher participant identified post-high school support for G&T students as an area of need because she does not believe that SPS's G&T students are reaching their expected level of success. This contributor shared that she feels this way since SPS students who were identified as gifted or talented attended the same college and work the same job as her daughter who was not identified as gifted.

As a former administrator who oversaw the development and implementation of countless Individual Education Plans (IEPs) that included transition plans for students deemed deficient based on eligibility testing and assuming that gifts and talents require nurturing, I trust that similar transitionary plans with education and employment supports and goals could be developed, implemented, monitored, and refined over time as part of G&T students' Academic Career Plans (VDOE, 2018-a).While I am not sure that such a plan is warranted based on one teachers' report, the comment did get me thinking. Furthermore, I fear that the state-endorsed Academic Career Plan's early identification and tracking of students might perpetuate or even enhance the marginalization of people based on factors such as social identities (i.e. race, ethnicity, socioeconomic status). Nevertheless, the inclusion of G&T transition plans that are akin to those that appear in IEPs might prove useful in connecting future G&T students with district and community-based resources that might help them excel after graduation. Additionally, SPS could maintain communication with G&T students and collect data on them after high school to monitor their achievement and to determine how to improve G&T instruction, policy, and practice and possibly transitionary goals for future students.

Fidelity of Implementation

Two G&T staff members and one teacher claimed that SOAR is effective when implemented with fidelity. The G&T staff members said that differences in practice could be attributed to differences in perceptions between administrators and teachers. Similarly, one GSS said there are inconsistencies in G&T program implementation as well and shared that she has observed entirely gifted classrooms where students failed to get "exactly what they deserve." Whatever the case, unfaithful application of any program is concerning since differences in practice might affect the program's impact, make it harder to assess program effectiveness due to error (McMillan, 2012), and as a result, might faultily affect policy and practice. That said, one way SPS tries to mitigate SOAR error is by using scripted lessons and activities which are housed in the program's Flight Manual; a strategy that one BLA would like to see the G&T program adopt for consistency purposes as well - which I respect. However, I also wonder if the scripted approach is limiting, particularly in terms of teachers' autonomy and developing students' critical-thinking and creativity skills, both of which appear as critical skills outlined in Virginia's current Profile of a Graduate (VDOE, 2018-c). Other ways that might enhance SOAR's program fidelity might include: requiring SOAR to be part of the master schedule;[25] aligning SOAR lessons with the core curriculum to show that SOAR is supplementary rather than separate (apparently this is in progress); requiring teachers to complete and submit daily checklists or activity logs to their administrators (McMillan, 2012), and requiring leaders to complete checklists during walkthrough observations. In addition, including tenets of SOAR instruction as indicators on observation forms might help alleviate fears of penalization for

[25] Designating time for SOAR within the master schedule will allow for time that is free of restrictive and rigid standards-based practices and that provides students space to recognize, demonstrate, and refine their talents which might help them to secure referrals and maybe even be identified as G&T.

straying from the state curriculum, and developing and implementing professional development (PD) sessions that respond to inconsistencies identified through observations, surveys, and interviews (McMillan, 2012).

Professional Development

Several participants shared that SPS's professional development for G&T and SOAR are lacking, especially for BLAs. I assume these claims are accurate since they came from multiple contributors who hold different job titles within the division. For example, SOAR teachers reported receiving little PD with one SOAR teacher reporting she only received the Flight Manual and a quick walkthrough of SOAR's scripted lessons. Another SOAR teacher said she only participated in a half-day SOAR training. In addition, veteran BLAs said G&T and SOAR PD, provided exclusively by GSS consultants, is inadequate due to the GSS's extensive workload and resulting unavailability. Moreover, GSSs shared that they are also largely responsible for teacher training but are limited by funds, resources, time, and other competing factors. Thus, I question if the PD goals and objectives outlined in SPS's 2017-22 *Plan for the Education of the Gifted (PFTEOTG*) are being addressed as planned. Based on this information, I discuss and offer recommendations for BLA, teacher, and even parental PD in the subsections below.

Administrative

BLA PD appears to be an immediate need since contributing BLAs fail to see SOAR as worthwhile, BLAs seem to have the autonomy and willingness to abandon the program immediately, and BLAs are perceived as both overwhelmed and possessing a "[G&T] kids are going to pass [anyway]" mentality. In my experience, many school and district administrators subscribe to the latter belief due to an over-emphasis on high-stakes test performance which

deemphasizes the importance of self-actualization for all students – particularly those on the higher end of the ability spectrum. As a result, district, state, and leadership preparation programs might consider the implications that long-standing school evaluation policies and practices hold and/or have held for all students and work towards developing more comprehensive methods that benefit everyone, not just those deemed targets by policymakers.

In focus groups and interviews, GSS participants discussed the importance of G&T and SOAR PD for BLAs. They said they hope that increasing BLAs' capacity in the area of G&T and SOAR might increase support for both programs. They also said that now is a good time to secure BLA backing since SPS has a lot of new leaders. Furthermore, they stated that it might be beneficial to train upper administrators (i.e. directors) in hopes that doing so would establish and enhance support for G&T in light of the vast number of competing initiatives that directors must navigate. The GSSs also mentioned that they must step lightly as being too aggressive might be off-putting and counterproductive.

School-Based Gifted

Two GSS participants said that SPS's teachers need to understand that CBG is not the only G&T program in the division; rather, School-Based Gifted (SBG) programs exist too and these programs exist in their schools – something that could be rectified through vertical alignment (discussed later). The GSSs also mentioned that the lack of SBG teachers in individual schools limits SBG teacher comradery, strengthens silos, and leads to instructional differences between schools. Recognizing this as a concern, the GSSs held an SBG PD session in 2017-18 for three science and social studies teachers (some new faculty and some veterans) from each grade level (sixth, seventh, and eighth) from all twelve of SPS's middle schools. The GSSs explained that they began the PD session by exposing teachers to different classroom activities

and strategies like “tapping into socioemotional needs” and later placing them in cross-county professional learning communities (PLCs). The GSS’s shared that the cross-county PLCs allowed teachers to share information based on their classroom experiences. The information they shared was later posted to and is now accessible via Google Classroom. The GSSs said that they still need to host similar sessions for SBG middle school English and math teachers and elementary teachers but are aware that factors like funding, time, and competing initiatives might prevent them from doing so.

The GSSs reiterated that too much PD, implemented too fast, might be off-putting and counterproductive, adding that they need to step cautiously.

Gifted and Talented Referrals

Based on Renzulli’s (2012) Rudder and Compass Theory, I believe that developing and including diversity goals, as suggested by Ford & King (2014) and Siegel-Hawley & Frankenberg (2013), as part of SPS’s G&T program’s mission and vision will provide a clear trajectory which might improve policy and practice and could hold implications for the program’s demographic proportionality.

Additionally, given the rebrander’s claim that teacher referrals are a primary “stopgap” to G&T entry and the claim that teachers refer only those who are “smart” or rule-followers and not “discipline problems,” SPS might consider additional PD on multiculturalism and multicultural instruction (Ford et al., 2008) and on how G&T traits manifest across different cultures (Callahan, 2005; Elhoweris et al., 2005). Training potential referrers on multiculturalism and cultural characteristics, might help employees to recognize and/or strengthen understandings around giftedness dynamism and to understand that related traits might be affected by opportunity access (Ford & King, 2014; Mandelman et al., 2010; Peters & Engerrand, 2016;

Schmidt et al., 2015 via Subotnik et al., 2017; Vopat, 2011). Likewise, it might be useful to provide implicit bias training so potential referrers can acknowledge, consider, and work against any biases that might impede G&T referrals (Elhoweris et al., 2005; Ford & King, 2014; Ford et al., 2008; Mandelman et al., 2010).

SPS might also want to consider differentiating definitions of intelligence, ability, creativity, talent, and giftedness thereby enhancing construct validity through clarifying what giftedness is, what it is not, and enhancing referrers' capacity to recognize specific traits as deficient, average, or superior (McMillan, 2012).

Vertical Articulation

As an administrator, I worked at a school that housed both eighth and ninth grades. In Virginia, at the secondary level, eighth and eleventh grades are capstone years for some Standards of Learning (SOLs) which means that some SOL tests assess skills learned over multiple years (i.e. Eighth Grade Writing) (VDOE, 2018). Therefore, vertical articulation was very important in my division, since secondary grades were spread across three schools (i.e. Middle = sixth and seventh; Junior High = eighth and ninth, and High = tenth, eleventh, and twelfth). Vertical articulation helped ensure teachers understood curricula standards and were adequately preparing students with the appropriate foundational skills before advancing them to the next grade. These formal conversations were especially important due to time constraints (it is not feasible to cover three years-worth of instruction between September and May; SOL tests are typically administered in May) and to make sure there were no gaps in instruction.

During my SPS teacher focus group, one SOAR teacher mentioned having similar conversations with Center-Based Gifted (CBG) teachers in her school. She shared that these discussions helped her to better understand gifted traits, which align with characteristics that she

claims to have learned about through referral and eligibility PD, and she believes that having a better understanding of what to look for has enhanced her ability to identify students for G&T evaluation.

Based on my professional experience and information gleaned from research participants, I trust that encouraging two-way vertical conversations between referring teachers and gifted teachers, whether formal or informal, might help to build referring teachers' capacity, reduce the need for referral and eligibility PD, and free up time for other G&T PD sessions. Of course, not every SPS school has a CBG; therefore, vertical articulation might have to take place across schools either in formal PD sessions, online or between referring teachers and their in-house School-Based Gifted (SBG) colleagues. I also trust that articulation across and within grade levels might also help to curb perceptions of elitism and misunderstandings about gifted instruction (i.e. giftedness is conflated with and is the willingness to do more, potentially unnecessary work) through enhanced understandings which might improve school climate and culture and lead to more accurate perceptions and subsequently qualitative data. Again, qualitative data is currently the sole data-type that SPS's decision-makers use to evaluate and adjust the G&T program and higher-quality data should result in more informed decisions.

Parents

One teacher participant asserted that parents who had bad educational experiences are apathetic towards schools and related programs and are content with their children simply getting by. While this perception seems short-sighted, stereotypical, and is concerning, this not the first time I have heard such an allegation. I also believe that this participant is not the only internal or external stakeholder in SPS who feels this way. As a result, I pondered: What is a district's responsibility when it comes to informing parents on programmatic offerings? Apparently, a few

SPS schools shared my thought and have started to address this question through G&T open houses. The district also held a community night called "Engage Sunnydale." These events were designed to enhance parental knowledge and support for SPS's G&T program. Teacher participants said that the open houses targeted parents who had students in third-grade and up, gave them opportunities to see school and classroom environments and allowed them to ask any questions that they might have. G&T participants said that Engage Sunnydale was held at one of SPS's high schools in December 2017; that the event was well-attended despite short notice; that parents learned about SPS's gifted services, levels of services, and important deadlines; that breakout sessions addressed topics like "traits of a gifted child." Additional sessions explored topics such as, "What do you do with a gifted child at home?" and "Twice-exceptional students," which included related special education laws. Finally, schools' enrichment programs and community resources (i.e. the public library) had information booths set up around the school. Unfortunately, G&T staff contributors said that open houses and community nights have not been widespread due to the inability to staff or support them on a large scale. Nevertheless, I believe that both Engage Sunnydale and the open houses were steps in the right direction and I believe that SPS needs to continue and expand efforts to educate and include parents and its community either at the macro (district) or micro (school) level as doing so might help to remedy misinformation, curb claims of elitism, build parents' capacity to appropriately identify and nurture their children's gifts and talents at home (perhaps through SOAR type lessons), and enhance the number and accuracy of G&T parent referrals.

Parent education might also address, as suggested by one teacher, "the influence that trauma, early experience, and intervention, and basic nutritional health have on student

performance," related resources, and might help mitigate parents pressuring teachers and the district into referring and falsely identifying their children as gifted or talented.

Comprehensive Professional Development

As mentioned in Chapter Four, SPS's GEC said that the G&T department has given G&T teachers a menu of PD options to choose from in the recent past. Providing teachers choices has allowed them to choose which PD sessions to attend based on their perceived needs and interests. Choices have also allowed teachers to opt out of sessions that they did not want to attend which has led to some knowledge gaps. Recognizing this as a concern as well as the need for training due to newly adopted referral and identification procedures, the GEC is planning a more comprehensive approach to G&T PD for 2018-19 that will "focus on impacts on student learning versus a 'smattering' or select window of items that stressed implementation." I commend the GEC for recognizing the need for a different approach to PD and adjusting accordingly. I also commend him for his past efforts to not only afford teachers autonomy but also to keep teachers in the classroom (versus attending countywide PD sessions) as much as possible both of which house implications for morae and student performance.

SOAR Expansion

Like teacher and G&T participants, and based on Renzulli's Enrichment Triad Model (ETM), Gyarmathy and Senior's (2016) aligning of the ETM with Bloom's Taxonomy, and Olszewski-Kubilius & Thomson's (2015) and Dai's (2017) view, I believe that SOAR needs to be expanded not only to other elementary grade-levels but also to secondary schools as well. From a literature perspective, SOAR currently provides Type 2 enrichment, as defined in the ETM, and focuses on promoting creativity and enhancing problem-solving skills over the course of one school year, which is not likely enough time to cultivate talent. Further, ETM Type 3

enrichment involves using these skills coupled with foundational skills to address real-world situations and according to Gyarmathy and Senior (2016) involves synthesis and evaluation which are upper-level Bloom's skills and should be nurtured during adolescence and/or adulthood. Similarly, Subotonik et al. (2011, via Olszewski-Kubilius & Thomson, 2015) claimed that competency and mastery should be addressed during adolescence and field success and creative productivity in adulthood. Dai's (2017) view aligns with Gyarmathy and Senior's (2016) and Subotonik et al.'s (2011, via Olszewski-Kubilius & Thomson, 2015) and supports skill and talent development in secondary school and the personalization of both in or after secondary school.

Final Recommendations

Some final recommendations based on information shared by participants during my investigation include: Training and encouraging employees to avoid derogatory statements like "your daughter is too social for the [G&T] program" which might lead or perpetuate claims of elitism; avoiding caving to (presumably privileged) parent pressures to identify their children as gifted and talented (G&T) without substantive support to do so; "recogniz[ing] that all students have talents," "focus[ing] on talent development versus skills acquisition" (particularly for those who might have opportunity gaps) and to encouraging problem-solving and critical thinking in all students.

Contributions and Future Research

As previously mentioned, this study adds to the talent development (TD) knowledgebase by offering SOAR commendations and recommendations on topics like testing, support, implementation, PD, and expansion that are based on participant perceptions, document

analyses, Fellinger et al.'s (2017-a) study, and existing literature - all of which might inform future TD policy and practice and leadership preparation programs.

Based on participant responses, this study's perceived limitations, and Fellinger et al.'s (2017-b) suggestions that continue to be relevant, future SPS SOAR research might evaluate fidelity of implementation both within and across SPS's schools. It might also investigate relationships between students' SOAR pre-/post-test scores and their performance on Standards of Learning (SOL) assessments. Similarly, researchers might investigate relationships between students' SOAR pre-/post-test scores and their performance on the Scholastic Aptitude Test (SAT). Other SOAR research might use mixed-methods to gather further perceptions of SOAR from a variety of internal and external stakeholders, assess causality to confirm or deny that SOAR is enhancing problem-solving and reasoning abilities, is leading to more G&T referrals, and is not affecting G&T eligibility (Fellinger et al., 2017-b).

Future SPS research might also analyze G&T referral and eligibility data to identify and hopefully respond to discrepancies between recommendations and found giftedness (Fellinger et al., 2017-b). Such research might involve monitoring eligibility type (i.e. English only, math only, or both) for trends by school (i.e. SOAR versus Non-SOAR) and assessing referral validity (Fellinger et al., 2017-b) to see, as one BLA put it, if referrers "are looking beyond the typical academic achiever." In addition, further research might explore longitudinal data to see how many SOAR students are found eligible for G&T or accelerated services over time (Fellinger et al., 2017-b), track students' success in G&T or accelerated programs as they progress through school (Fellinger et al., 2017-b), and track G&T students after high school and explore ways to support transition to enhance self-actualization. Related to tracking success, future researchers might seek to develop or adopt a vetted growth measure that can be used to assess G&T program

effectiveness. Also, due to recent changes to SPS's G&T eligibility policy and practice, future research might entertain how SPS's new assessments and procedures affect G&T demographics as compared to earlier years and over time and might compare and evaluate new versus old language on past and future district artifacts via discourse analysis.

Additionally, researchers might consider investigating confounding and extraneous variables such as how non-SOAR pedagogic practices and home life might affect student performance on measures like the CogAT (Fellinger et al., 2017-b). Similarly, SPS might also investigate how confounding and extraneous variables might impact English Language Learner (ELL), Students with Disabilities (SWDs), and Economically Disadvantaged (Econ. Dis.) students' scores specifically (Fellinger et al., 2017-b). Finally, SPS could learn much by studying what effect, if any, teacher demographics have on G&T referrals and found eligibility (Bernal, 1981; Castellano, 1998; Ford, 2014 via Fellinger et al., 2017-b).

Another recommendation for SPS is to make not only macro but also micro-level data, to include demographic indicators like race, ethnicity, socioeconomic status, more accessible to researchers (Nicholson-Crotty et al., 2016). Making disaggregated, individual-level data more accessible would allow future researchers to specifically identify the mechanisms responsible for things like an individual teacher's increase in minority referrals for G&T evaluation or for successfully helping marginalized students gain access to the G&T program. In other words, details that get lost in aggregated data and are essential to sound decision-making. For example, in their study, Nicholson-Crotty et al. (2016) used teacher and school-level data and found that Black students were assigned to G&T education at higher rates when their teacher was a member of their in-group. One reason offered for this phenomenon involved "active" representation where supporters could empathize with their clients and offer positive, subjective assessments to

support them. The researchers also concluded that having additional Black staff in the school had little bearing on individual students as their performance was only directly impacted by their classroom teachers. Based on this information, school leaders would be wise to make organizational decisions that result in assigning students to teachers based on "individual-level congruence[26]" and not simply hiring teachers for the sake of diversifying their school.

Personal Learnings and Ongoing Tensions

Personal Learnings

Over the course of this study, my position evolved from being an advocate for specialized G&T instruction to being a proponent of pluralistic talent development (TD) that allows all students to work towards self-actualization. My opinion on TD as a vehicle to enhance the representativeness of G&T programs has changed as well; although, I do not want to discount the idea altogether as the intent is noble; it just does not address the larger issue of institutionalized racism. As a newfound champion for TD, I advocate for dismantling formal G&T programs and replacing them with TD for all; however, as a practitioner, I realize this is a bold and unlikely move particularly since I witnessed significant parental and community backlash when the school board in my former district discarded the district's International Baccalaureate (IB) program; a program parents perceived as advanced program. The point I am trying to make is that I do not think G&T programs as they stand now can or will be eliminated due to social and political barriers; however, I do believe a maverick district that is willing to brave the fight could introduce TD programs that would eventually replace G&T programs in time using a slow and deliberate effort that involves a variety of stakeholders and a sound comprehensive plan (Glickman, Gordon, Ross-Gordon, 2009). Should a revolutionary district assume this

[26] For clarity, I realize that student assignments cannot be based on factors like race, ethnicity, religion, etc.

undertaking, I believe Renzulli's (2012) Revolving-Door Model is worth considering since it promotes self-actualization for all via temporary enrichment (when students' unique strengths manifest) as well as inclusionary benefits in mixed-ability settings that allow students to learn from their peers (Gyarmathy & Senior, 2016; Renzulli, 2012; Subotnik et al., 2011 via Olszewski-Kubilius & Thomson, 2015) and build their communication, collaboration, critical-thinking, creativity, and citizenship skills that align with Virginia's current Profile of a graduate (VDOE, 2018-c).

Ongoing Tensions

Early iterations of this project were critical in nature and proposed using discourse analysis to explore meta-narratives and counternarratives to uncover and understand power dynamics to hopefully generate structural reform; hence the postmodernist portion of my theoretical framework. Over time, my study evolved and became more pragmatic in nature as I sought to understand SOAR qualitatively and used my understandings coupled with my lived experiences to interpret and construct recommendations for program improvement (i.e. making the SOAR pre-/post-test more reliable by adding one question per skill to make it a better tool by which to gauge program effectiveness and to consider in the decision-making process).

During my defense, one committee member mentioned that my project and resulting recommendations were pragmatic and post-positivistic and not really postmodern. He was absolutely right. He helped me realize that I defaulted to my administrative conditioning and concerned myself with things like objective, measurable growth, inter-rater reliability, construct validity, and fidelity of implementation in an attempt to make my work useful. On the one hand, I have no qualms with the pragmatic and post-positivistic labels, especially since I want my understandings to be useful tools that readers can place in their tool boxes and pull out when

needed, especially If they help students (Foucault (1994) and Rizvi & Lingard (2010) as referenced in Mansfield (2016)). However, on the other hand, when viewed more critically and on a macro-scale, SOAR is not really addressing the long-standing, underlying issue of racism in G&T education. In fact, it seeks to rectify racial and ethnic disproportionality in SPS's G&T program through test preparation in hopes that some students will gain access via assimilation, can be damaging to students' uniqueness and creativity. On the flipside, getting students into the G&T program and diversifying the program's population might prove beneficial for both individuals and their program-mates in ways such as enhancing their social, psychological, and academic outcomes, increase their likelihood of attending college, and give them access to broader social networks (Dawkins & Braddock III, 1994; TCF, 2016; Wells, Fox, & Cordova-Cobo, 2016). Again, research using micro-level data to examine the effects of specific mechanisms would need to bear this out (Nicholson-Crotty et al., 2016). Returning to my previous point, neither SOAR nor improving SOAR will rectify the larger issue that historic racism undergirds G&T (Mansfield, 2016).

So, what are the implications? Will dismantling existing G&T programs and rebuilding them absolve power-dynamics? Or will doing so simply create new power issues? And could a district dissolve G&T in favor of talent development for all? What would be the socio-political implications/repercussions? These are all debatable positions to ponder, but no one will know for sure until someone or someplace assumes the risk and later assesses that risk. And even then, the outcomes might be context specific and will require additional research.

Conclusion

This study, like my position on G&T and TD programming, evolved. While, three-fourths of the study's theoretical framework (constructivism, interpretivism, and subjectivism)

still applied, the postmodern portion gave way to practitioner-based understandings that were post-positivistic and led to pragmatic recommendations. And despite my personal growth where I now favor TD for all over G&T tracks, I recognize that SOAR has a noble intent and that a structural overhaul to dismantle institutional racism is unlikely for sociopolitical reasons that many districts are unwilling to breach for concerns like the threat of backlash and the amount of groundwork involved in such a change, Accordingly, the suggestions offered within this chapter mostly seek to advance SOAR's goal of improving the proportionality of historically marginalized students because quite frankly the TDP the best tool SPS currently has at its disposal to address the issue of G&T disproportionality. Also, as previously mentioned, these recommendations along with my commendations and other understandings might hold implications for other districts and leadership development programs when considered in concert with other research. Lastly, I threaded some critical, arguably postmodern points throughout this final chapter for possible consumers to consider in hopes that they will serve as an impetus for change.

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Appendix A

Invitation to Participate Email

Teachers, Building-Level Administrators, and Gifted and Talented Specialists,

My name is Christopher Sumner and I am a Ph.D. candidate at Virginia Commonwealth University (VCU). I am writing to request your participation in a study that I am conducting on Sunnydale Public School's SOAR program. More specifically, I am investigating employees' perceptions of the program.

Attached, please find a one-page overview of my study. If you are interested in participating, please reply to this email and specify if you wish to participate in focus groups or individual interviews. Also, teachers - please indicate if you are a TDP (SOAR) teacher or a Non-TDP (SOAR) teacher.

If you are unsure if you wish to participate and would like more information before deciding, please feel free to contact me at (804) 691-7327 or sumnercm@mymail.vcu.edu. You may also contact Dr. Genevieve Siegel-Hawley at gsiegelhawle@vcu.edu.

Thank you in advance for your time,
Sincerely,
Chris

Appendix B

Participant Information Sheet

Participant Information Sheet	
Study	• This research study is an extension of Fellinger, Hawthorne, and Venable's (2017) study on the Talent Development Program (TDP) • This study responds to the researchers' call for additional qualitative research to understand teachers' *[building-level administrators', and central office administrators']* perceptions of the TDP in greater depth
Central Argument	• Given the current national demographic trends, all students' gifts and talents should be acknowledged, nurtured, and developed for the good of the American workforce (Siek & Sterling, 2012) and the United States (U.S.) (Peters & Engerrand, 2016)
Purpose	• To develop an understanding of the TDP, to develop recommendations for TDP policy and practice, and to add to the field's knowledgebase
Methodology	• I will recruit participants on a volunteer basis; snowball sampling if needed • I plan to recruit participants from schools and the central office o School-level participants will come from Title I schools • I will employ interpretative qualitative methods • I will collect data through interviews, focus groups, and document analyses • Data will be audio or hand recorded, transcribed, line numbered, and member checked • I will hand-code data, group it into thematic categories, and then interpret it

Confidentiality	• Participants will be asked to choose a pseudonym to protect their identities
	• Interviews and Focus Groups will be held at a central location other than participants' home school for comfort and confidentiality reasons
	• Data will be password protected, stored on an external device, and will be housed in a fire-proof safe that is housed at a secure residence
	• Federal standards require that research data be kept for a minimum of 5 years
	  o After 5 years, I will delete/destroy all data related to this study
	  o I will delete Audio recordings and my participant key once they are no longer needed

Participation	• Please know that participation in this study is voluntary and that you may discontinue your participation at any time by simply notifying the researcher
Questions	• Please contact Chris Sumner at (804) 691-7327 or sumnercm@mymail.vcu.edu

Appendix C

Individual Interview/Focus Group Interview Questions

1. Tell me about your experience working with gifted and talented students.
2. Tell me about any professional development you've had around working with gifted and talented students.
3. How do you define:
    a) intelligence
    b) ability
    c) creativity
    d) talent
    e) giftedness?
4. What are the purposes of the G&T program?
5. Is the G&T program effective? In what ways? How do you know?
6. What would you say if you found out that there is an overrepresentation/underrepresentation of students in G&T programs according to social identities such as race/ethnicity and socioeconomic status? Why do you think that is? What, if anything, do you think needs to be done about it?
7. What are the purposes of SOAR?
8. Is SOAR effective? In what ways? How do you know?
9. What would you say if you found out that:
    a) students in SOAR classrooms were demonstrating higher levels of reasoning and problem-solving abilities than their peers in non-SOAR classrooms?
    b) student participation in SOAR increased the number of gifted referrals when compared to non-participating students?
    c) student participation in SOAR does not necessarily result in an increase in program eligibility of historically underrepresented populations?
10. If you could change anything about the G&T program, what would it be? Why?
11. If you could change anything about SOAR, what would it be? Why?
12. Is there anything else you would like to share?

Vita

Christopher Mark Sumner was born in December 1981 in Petersburg, Virginia, and is an American citizen. Christopher graduated from Colonial Heights High School in 1999. Christopher received his Bachelor of Fine Arts in Art Education and Master of Education in Administration and Supervision from Virginia Commonwealth University in 2003 and 2014 respectively. Christopher received the VCU School of Education Alumni Doctoral Scholarship and William C. Bosher Scholarship in 2014, the Phi Kappa Phi Graduate Scholarship in 2015, and the Seyfarth Family Scholarship in 2016. In addition to academics, Christopher is a veteran educator who worked as art teacher in Danville, Virginia from 2003 to 2004, Prince George, Virginia from 2004 to 2011, and Colonial Heights, Virginia from 2011 to 2015. Christopher also served as an assistant principal in Prince George, Virginia from 2015 to 2018. Christopher is currently a part-time art teacher, part-time administrator at Colonial Heights High School.